MARKETING COLLATERAL - 1990

INPUT
1280 Villa Street, Mountain View, CA 94041-1194 (415) 961-3300
Telex 171407 FAX (415) 961-3966

INPUT ANNUAL REPORT

January 16, 1990

Z..CALIFORNIA INTERNAL
Sales/Mkt Library
X
X,

Dear Sir/Ms:

Thank you for your business support this last year. We at INPUT very much appreciate it and look forward to being of further service to you in 1990 and throughout the last decade of the 20th century.

I would like to give you a status report on INPUT and our plans for 1990 to assure effective and high quality service.

As a company we made substantial changes particularly at the year end:

1. In October we announced the formation of INPUT KK in Tokyo. This Japanese operation is already operating profitably under the direction of Tetsuo Imai.

2. In October we also announced the reinvigoration of our New York/New Jersey operation through the hiring of Tom O'Flaherty as Vice President.

3. We have reorganized the Mountain View, California and New Jersey operations to provide more responsive support.

4. We have expanded our operation in Paris to provide research capability.

5. We introduced a "Systems Operations" Program to accompany the Systems Integration Program in the U.S. and now also in Europe.

The fundamental change has been the establishment of each "office" as an independent business unit.

INPUT, Inc. (Washington, D.C.)

During the year, John Frank was appointed President of this company.

Its business continues to expand dramatically. In addition to the Federal Information Systems and Services Program, this office supports the U.S. Systems Integration Program which made great strides in 1989 under the direction of Mr. Doug Wilder. Jim Kerrigan and his staff have increased the number of subscription and custom clients for the federal program substantially. This unit will operate the newly announced Systems Operations Program to complement the Systems Integration Program. Alex Graham is concentrating on the network related opportunities in these areas. Our very effective business development operation is run by Scott Lewis assisted by John Quackenboss.

INPUT, Ltd. and INPUT s.a.r.l. (London and Paris)

Under our European Managing Director, Keith Hocking, business again grew substantially in 1989. The Paris operation under M. Thierry Dumont has added a research capability and established offices to support its growth.

In Europe, the Vendor Analysis Programme has started and the Electronic Data Interchange Programme with Tim Stevens in charge expanded to a Network Services Program. The research staff in Europe, reporting to Peter Lines, has almost doubled in this past year to support the additional research needs.

INPUT's Systems Integration and Systems Operations research now covers Europe as well as the U.S. European research is directed by Henry Trull.

The Market Analysis Programme in Europe under the direction of Michael Ratcliffe goes from strength to strength as does the Customer Services Programme run by Ken Carter.

It is likely that a German company will start operation in 1990.

INPUT KK (Tokyo)

Mr. Imai has already carried out research projects in Japan for U.S. companies. The number of Japanese clients is growing very quickly. This operation will add Japanese research programs in 1990.

INPUT (Mountain View, California and Parsippany, New Jersey)

This is the area of the company with the most structural change.

First, the custom and program staffs have been integrated to strengthen the program research and analysis capability and to relate custom work more closely with the programs.

Second, programs have been refocused and relocated, primarily as a result of the needs expressed by customers through customer satisfaction and other surveys. These are explained below.

The reorganization has resulted from a concerted effort by myself, Denny Wayson, Tom O'Flaherty, and Bob Goodwin. I have functioned as Research Director of the Mountain View office for the past month and will continue to do so for the first quarter of 1990. Denny Wayson is currently acting as Vice President in charge of client services and business development. He is supported by Nancy Hill, our National Accounts Director, and Denny White, who in 1989 successfully completed the largest custom project (almost $300,000) we have performed for a client.

- *Vendor Analysis Program and Customer Services Program*

  Responsibility for these programs has been shifted to New Jersey and specifically to Tom O'Flaherty supported most ably in the customer services area by Buddy Stigler.

  The prime reasons for this shift are the location of the key people and the nature of the support required. Almost all the "hotline" customer support inquiries are for rapid-response, tactical information: since most of our clients are on the East Coast, time zone differences are eliminated by having the programs operated from New Jersey. Also, as the nature of both these programs change, we find an increasing need for trans-Atlantic support in both directions.

- *Electronic Data Interchange Program*

  This program is now under the direction of Denny Wayson, Vice President, and supported by Torrey Byles, Denny White, and others. The nature of the program is being changed for 1990. It is becoming more analytical and issue oriented. Its scope is expanding to cover EDI-related financial transactions and user implementation requirements.

- *Market Analysis Program*

This program now has two co-directors. Mary Raymond is focusing on the "annual" reports - the market analysis and forecasts by delivery modes, professional services, software products, etc. Norman Litell is focussing on the vertical and cross-industry sector analyses and forecasts.

Client support requirements here are primarily analytical in nature, requiring high-level analyst interaction. Recently these interactions were being handled at too low a level. Client support is now handled directly by the senior staff in Mountain View with the first points of contact being Denny Wayson, Nancy Hill, and Denny White, supported by Norman Litell, Mary Raymond, and Peter Cunningham. On the East Coast when time is critical, Tom O'Flaherty is also a source of support as is Alex Graham in our Virginia office. This focuses our highest level of support in this core program.

Another major change is the delivery of research material. INPUT has traditionally provided its work through bound reports - these will still be produced. However, clients need the information in more easily digestible "bites." As a result, INPUT will be issuing Research Bulletins throughout the year. These bulletins will provide the pieces of the individual reports as the information becomes available. For example, the banking and finance industry sector report contains a section on the savings and loan industry - that section of the report will be issued as soon as available as a Research Bulletin which can be assimilated, circulated and disposed of easily. When you need to access it as a reference item, it will be there in the report which may actually arrive on your desk several months later.

In this manner we can support:

- Need for quick response, easily assimilable information
- Need for reference material

- *Information Systems Program*

The program has been redirected to examining the use of external services (outsourcing) by IS organizations. It is managed by Denny Wayson.

- *Custom Research*

  In the New Jersey office, Tom O'Flaherty will be responsible for the development of this business. He will have a particular focus on software related projects, particularly in the CASE area. In Mountain View, Denny Wayson will develop the Information Systems consulting that is successfully growing. Denny White will focus on vendor related projects particularly in EDI (where we have just completed a major project for the EDIA on standards), networks, and expert systems.

This report would not be complete without taking note of the magnificent work of the production department in Mountain View under the direction of Sheila Collins. There are currently over 55 reports in production as a result of the completion of the 1989 research portfolio, which with a few small exceptions, was completed by December 31.

As a result of the reorganization, we have regretfully reduced our junior staff levels and do not intend to replace them. We will be adding senior level staff as business requires it.

Independently, Bob Goodwin will be resigning to pursue a great opportunity with a turnkey systems company. I would like to thank him for his support and wish him well. Apart from Bob only two senior research staff have left INPUT of their own volition this past year. We hope to keep our staff loyalty and continuity this year.

In 1990 we want to meet with you to make your programs more responsive and to present the results of your research. To that end we will be calling you this month. Indeed, we will be calling you regularly as part of our renewed commitment to quality and service.

On behalf of INPUT, may I wish you and yours a happy and successful 1990 and decade ahead.

Yours sincerely,

Peter A. Cunningham

Peter A. Cunningham
President

PAC:cc

About INPUT

Company Profile

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/ consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and sevices (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff have more than 20 years experience in their areas of specialization. Most have held management positions in large organizations, enabling them to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Staff Credentials

INPUT's staff have been selected for their broad background in a variety of functions, including planning, marketing, operations, and information processing. Many of INPUT's professional staff have held executive positions in some of the world's leading organizations, both as vendors and users of information services, in areas such as the following:

- Processing Services
- Professional Services
- Turnkey Systems
- Applications Software
- Field (customer) Service
- Banking and Finance
- Insurance
- Process Manufacturing
- Telecommunications
- Federal Government

Educational backgrounds include both technical and business specializations, and many INPUT staff hold advanced degrees.

U.S. and European Advisory Services

INPUT offers the following advisory services on an annual subscription basis.

1. Market Analysis Program—U.S.
The Market Analysis Program provides up-to-date U.S. information services market analyses, five-year forecasts, trend analyses, vertical/cross-industry market reports, an on-site presentation, hotline inquiry service, and sound recommendations for action. It covers software, professional and network services, turnkey systems, and professional services markets. It is designed to satisfy the planning and marketing requirements of current and potential information services vendors.

2. Market Analysis Program—Europe
This program is designed to help vendors of software and services with their market planning. It examines the issues in the marketplace, from both a user and a vendor viewpoint. It provides detailed five-year market forecasts to help plan for future growth.

3. Vendor Analysis Program—U.S.
A comprehensive reference service covering more than 400 U.S. information services vendor organizations, VAP is often used for competitive analysis and prescreening of acquisition and joint-venture candidates. Profiles on leading vendors are updated regularly, and hotline inquiry service is provided.

4. Vendor Analysis Program—Europe
This is an invaluable service for gaining competitve information. Two binders are provided—one is a directory listing names, addresses, and turnover of some 700 European software and services vendors. The second binder contains profiles of about 300 key vendors.

5. Electronic Data Interchange Program—U.S.
Focusing on what is fast becoming a major computer/communications market opportunity, this program keeps you well informed. Through monthly newsletters, timely news flashes, comprehensive studies, a joint user/vendor conference, and telephone inquiry privileges, you will be informed and stay informed about the events and issues impacting this burgeoning market.

6. Network Services Program—Europe
Network services is a fast-growing area of the software and services industry. This program is essential to vendors of EDI, electronic information services, and network products and services. It keeps clients informed of the latest developments and includes a monthly newsletter on EDI.

7. Systems Integration Program—U.S.
Focus is on the fast-moving world of systems integration and the provision of complex information systems requiring vendor management and installation of multiple products and services. The program includes an annual market analysis of the U.S. systems integration and operations markets, SI vendor profiles and updates, topical market analysis reports, and an annual SI seminar.

8. Systems Operations Program—U.S.
This program includes an annual market analysis report of the systems operations and systems integration market, SO vendor profiles and updates, reports on network management and SO management practices, and an annual SO seminar.

9. Systems Integration Program—Europe
Systems integration and systems operations (facilities management) are key growth areas for the decade. This program examines these two areas and analyzes current market trends, user needs, and vendor offerings.

10. Federal Information Systems and Services Program
This program presents highly specific information on U.S. federal government procurement practices, identifies information services vendor opportunities, and provides guidance from INPUT's experienced Washington professionals to help clients maximize sales effectiveness in the federal government marketplace.

11. Information Systems Program
ISP is designed for executives of large information systems organizations and provides crucial information for planning, procurement, and management decision making. This program is widely used by both user and vendor organizations.

12. Customer Service Program—International
This program provides customer service organization management with data and analyses needed for marketing, technical, financial, and organizational planning. The program pinpoints user perceptions of service received, presents vendor-by-vendor service comparisons, and analyzes and forecasts service markets for large systems, minicomputers, personal computer systems, and third-party maintenance. A monthly newsletter helps clients keep informed of the latest developments in the market.

13. Customer Service Program—Europe
Customer service is an expanding area. Companies are now expanding from hardware service to more software-related maintenance and professional services. This program helps vendors penetrate these new areas and provides guidelines for future market strategy. A monthly newsletter helps clients keep abreast of the latest developments in the market.

14. Worldwide Information Services Market Forecasts, 1989-1994
In 1989 INPUT initiated this research study, which provides an international forecast for the information services market.

15. INPUT's sales office in Japan
Provides research services on U.S. and global information services to Japanese clients.

Customized Advisory Services

In addition to standard continuous-information programs, INPUT will work with you to develop and provide a customized advisory service that meets your unique requirements.

Acquisition Services

INPUT also offers acquisition services that are tailor-made for your requirements. INPUT's years of experience and data base of company information about information systems and services companies have helped many companies in their acquisition processes.

An Effective Combination

INPUT'S Executive Advisory Services are built on an effective combination of research-based studies, client meetings, informative conferences, and continuous client support. Each service is designed to deliver the information you need in the form most useful to you, the client. Executive Advisory Services are composed of *varied combinations of the following products and services:*

Research-Based Studies
Following a proven research methodology, INPUT conducts major research studies throughout each program year. Each year INPUT selects issues of concern to management. Topical reports are prepared and delivered throughout the calendar year.

Information Service Industry Reports
INPUT's Executive Advisory Services address specific issues, competitive environments, and user expenditures relative to:

Software	Professional Services
Processing/Network Services	Turnkey Systems
Systems Integration	Small-Systems Service
Telecommunications Service	Third-Party Maintenance
Office Systems	Large-Systems Service

Industry-Specific Market Reports

Detailed analyses of market trends, forces driving the markets, problems, opportunities, and user expenditures are available for the following sectors:

- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Utilities
- Telecommunications
- Retail Distribution
- Wholesale Distribution
- Banking and Finance
- Insurance
- Medical
- Education
- Business and Technical Services
- Consumer Services
- Federal Government
- State and Local Government
- Other Industry Sectors

Cross-Industry Market Report

A separate analysis covers the following cross-industry application areas:

- Accounting
- Education and Training
- Engineering and Scientific
- Human Resources
- Office Systems
- Planning and Analysis
- Other Cross-Industry Sectors

Hotline: Client Inquiry Services

Inquiries are answered quickly and completely through use of INPUT's Client Hotline. Clients may call any INPUT office (California, New York, Washington D.C., London, or Paris) during business hours or they may call a unique voicemail service to place questions after hours. This effective Hotline service is the cornerstone of every INPUT Executive Advisory Service.

The Information Center

One of the largest and most complete collections of information services industry data, the Information Center houses literally thousands of up-to-date files on vendors, industry markets, applications, current/emerging technologies, and more. Clients have complete access to the Information Center. In addition to the information contained in its files, the center maintains an 18-month inventory of over 130 major trade publications, vendor consultant manuals, economic data, government publications, and a variety of important industry documents.

Access to INPUT Professional Staff

Direct access to INPUT's staff, many of whom have more than 20 years of experience in the information industry, provides you with continuous research and planning support. When you buy INPUT, you buy experience and knowledge.

Annual Client Conference
Each year, you can attend INPUT's Annual Client Conference. This event addresses the status and future of the information services industry, the competitive environment, important industry trends potentially affecting your business, the impact of new technology and new service offerings, and more.

You will attend with top executives from many of the industry's leading, fastest-growing, and most successful vendor companies—and with top Information Systems (IS) managers from some of the world's most sophisticated user organizations.

On-Site Presentation by INPUT Executives
Many of INPUT's programs offer an informative presentation at your site. Covering the year's research, this session is held in the fourth quarter of each calendar year.

Proprietary Research Service

INPUT conducts proprietary research that meets the unique requirements of an individual client. INPUT's custom research is effectively used:

For Business Planning
Planning for new products, planning for business startups, planning for expansion of an existing business or product line—each plan requires reliable information and analysis to support major decisions. INPUT's dedicated efforts and custom research expertise in business planning ensure comprehensive identification and analysis of the many factors affecting the final decision.

For Acquisition Planning
Successful acquisition and divestiture of information services companies requires reliable information. Through constant contact with information services vendor organizations and continuous tracking of company size, growth, financials, and management "chemistry," INPUT can provide the valuable insight and analysis you need to select the most suitable candidates.

For the Total Acquisition Process
INPUT has the credentials, the data base of company information, and—most importantly—the contacts to assist you with the total acquisition and/or partnering relationship processes:

- Due Diligence
- Schedules and Introduction
- Criteria & Definitions
- Retainer and Fee-Based
- Active Search

For Competitive Analysis
Knowing marketing and sales tactics, product capabilities, strategic objectives, competitive postures, and strengths and weaknesses of your competition is as critical as knowing your own. The career experience of INPUT's professionals—coupled with INPUT's collection and maintenance of current financial, strategic, tactical, and operational information about more than 400 active companies—uniquely qualifies INPUT to provide the best competitive information available today.

For Market and Product Analysis
Developing new products and entering new markets involves considerable investment and risk. INPUT regularly conducts research for clients to identify product requirements, market dynamics, and market growth.

More About INPUT...

- More than 5,000 organizations, worldwide, have charted business directions based on INPUT's research and analysis.

- Many clients invest more than $50,000 each year to receive INPUT's recommendations and planning information.

- INPUT regularly conducts proprietary research for some of the largest companies in the world.

- INPUT has developed and maintains one of the most complete information industry libraries in the world (access is granted to all INPUT clients).

- INPUT clients control an estimated 70% of the total information industry market.

- INPUT analyses and forecasts are founded upon years of practical experience, knowledge of historical industry performance, continuous tracking of day-to-day industry events, knowledge of user and vendor plans, and business savvy.

- INPUT analysts accurately predicted the growth of the information services market—at a time when most research organizations deemed it a transient market. INPUT predicted the growth of the microcomputer market in 1980 and accurately forecasted its slowdown in 1984.

For More Information . . .
INPUT offers products and services that can improve productivity, and ultimately profit, in your firm. Please give us a call today. Our representatives will be happy to send you further information on INPUT services or to arrange a formal presentation at your offices.

For details on delivery schedules, client service entitlement, or Hotline support, simply call your nearest INPUT office. Our customer support group will be available to answer your questions.

- **California** ....(415) 961-3300
- **New York** ....(201) 299-6999
- **Washington, D.C.** ....(703) 847-6870
- **London** ....(071) 493-9335
- **Paris**...(33-1) 42-77-42-77
- **Tokyo**.......................................(03) 864-0531

INPUT®

Information Systems Industry

Information Systems Program

Information Systems Program

CRITICAL ROLE OF INFORMATION SYSTEMS

Information systems play a critical role in a company's competitive position, often making the difference between company profit and loss. The Information Systems (IS) organization must respond to this challenge as well as meet demands for quality, fast response, and controlled spending.

Vendors, particularly software suppliers, must understand the factors influencing the IS organization and its interactions with users.

The Information Systems program provides insight into these areas. The program is designed and supported by experienced IS executives who also understand the vendor environment.

1990 REPORTS

Executive Information Systems

This report analyzes the progress made by users and vendors in the Executive Information Systems (EIS) area. Over the past five years a growing number of vendors have lead the way using relational data base technology and personal computer interfaces to create a powerful tool for senior management. Using extensive surveys of EIS users and in-depth interviews of the leading vendors, the status of this effort will be presented and guidelines provided for information systems organizations undertaking an EIS program.

Outsourcing Developments

The outsourcing trend is gaining momentum as the new decade begins. In this report, INPUT looks at the factors behind the increased tendency for information systems management to turn to outside sources, not only for software and services, but for systems management as well. The report draws on research in systems integration and systems operations, and provide a framework for information systems management to consider outsourcing.

Key Trends/Technology for the 1990s

In its annual report on the information systems function, INPUT looks at the progress being made in emerging areas of technology. The movement towards distributed processing, use of servers and LANs, and use of image processing are among the topics planned for this report.

In addition, INPUT will update its annual assessment of driving forces and issues impacting information systems programs.

1989 REPORTS

Information Systems Management in the 1990s

This report analyzes technological development, business factors, and other issues that will significantly affect Information Systems management in the 1990s. Changes in expenditure patterns and organizational responsibilities are examined, particularly with reference to the management of technology deployment.

The impact on vendor marketing and sales strategies is evaluated. Recommendations for action are presented, particularly with reference to organizational and strategic responses.

Data Base Systems Developments

Experiences with, and plans for the use of relational and distributed DBMS are evaluated in terms of applications use, functions affected, organization units using them, and results of their use. The impact on software-based vendors of all types is examined. Recommendations for the effective use of such products are presented.

Developments in End User Computing

End user computing has been a part of the information systems infrastructure for close to ten years. It has undergone explosive change and has reached some level of maturity, with further change projected for the 1990s. In this report INPUT studies how these changes have affected end user support organizations in terms of budget, staffing and responsibilities; and forecasts the issues that end user computing will face over the next several years.

Also addressed are the changes in technology being deployed for end users and what new requirements this will place on the end user computing function in the 1990s.

INPUT®

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions, opinions, and ideas.

"Hotline" Inquiry Service
The hotline inquiry service provides support for small-scale research needs (requiring fewer than two hours) and provides clarification/amplification of report and presentation data.

On-Site Presentation
For an additional fee, INPUT will provide on-site presentations on current research or perform specific research requests.

INPUT Client Conference
This conference updates INPUT's clients on key industry developments and trends, and provides a forum for discussions with INPUT senior staff and executives of other client firms. Attendance at this conference is available for a reduced fee for full subscribers.

RELATED SERVICES

- The Systems Integration Program analyzes the opportunity for vendor-provided solutions to complex information, communications or automation requirements through the implementation of information products and services. INPUT provides SI research programs for both the U.S. and European markets.
- The Systems Operations Program provides detailed analysis to this emerging delivery mode.
- The Vendor Analysis Program provides profiles and support data on information services vendors.
- Custom Research and Consulting projects analyze user needs, information systems capabilities and strategies, alternative technologies, vendor capabilities, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meeting, user groups, or other functions.

PROGRAM DESCRIPTION

INFORMATION SYSTEMS INDUSTRY

1990 REPORTS

- Executive Information Systems
- Outsourcing Developments
- Key Trends/Technology for the 1990s

1989 REPORTS

- Information Systems Management in the 1990s
- Data Base Systems Developments
- Developments in End User Computing

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Presentation
- INPUT Client Conference

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House, 33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen
West Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho Chiyoda-ku,
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

If You Need the Best Available Analysis of Executive Information Systems Today . . .

- ▲ What are the New Ten Commandments of EIS?
- ▲ Who are the major players?
- ▲ What are the technological trends?
- ▲ How big is the market?
- ▲ How do you succeed with EIS?

. . . INPUT Can Put that Analysis at Your Fingertips Now!

A new INPUT report on Executive Information Systems clarifies the emerging opportunities and tremendous potential in this new, fast-growing, and sometimes confusing market.

And if you act before September 30, 1990, you can have the report for $60 less than the regular list price—a savings of 10 percent!

Executive Information Systems (EIS) are the vendor community's attempt to storm what has been a citadel of computer resistance—executive desktops.

The technological foundations of EIS have changed dramatically, with mainframe systems being supplanted by personal workstations, local and wide area network capabilities, and relational data bases with high-level programming tools. But the goal has remained essentially the same: to provide executives who are essentially computer illiterate with a flexible, easy-to-use tool for rapid, ad hoc access to information of all kinds.

Developments in Executive Information Systems
EIS—Past and Future
• Prior to 1990 • EIS—A Definition • After 1990
The User View
• Demographics • Status and Activity • Lessons Learned • Planning for the Next Wave • The Value of EIS
The Vendor View
• Market Structure • Key Software Vendors • The Changing Market • Market Forecast
Conclusions and Recommendations

EIS Answers

With INPUT's report on *Developments in Executive Information Systems,* users and vendors now have access to the results of a months-long, in-depth research effort designed specifically to determine the exact characteristics of the EIS arena, and how you can shape your development or marketing efforts to take advantage of the opportunities emerging there.

The report analyzes the following questions in detail:

- What are the new Ten Commandments of EIS development and marketing?
- Who are the new sponsors of EIS development, and who makes the purchase decisions?
- What are the relative degrees of importance given by users to 13 different subapplications and categories of data in EIS?
- In what specific ways does EIS differ from traditional systems, and how can you exploit those differences?
- What types of users are in the wings, how should you plan to meet their needs?
- What do users and sponsors say they want out of EIS?
- What job titles and functional areas use EIS today? How will that change over next 18 months?
- What is the relative importance of the goals of timeliness, quality of information, support of management process, and use of information technology, according to executive users?
- What are the typical development times for EIS?
- What is the initial total investment, including software and staff?
- Where are the trendlines headed in pricing?

INPUT answers these and many of the other questions that will have a direct, practical bearing on your success in penetrating this final frontier of corporate computer use.

An Invaluable Guide

In addition to these specific issues, INPUT focuses its research in this report on some of the broader questions surrounding Executive Information Systems. The EIS market is in a constant state of upheaval because of the rapid technological developments that continue to change the basic platform, and because in the final analysis, EIS must be constantly adapted to fit

INPUT®

1280 Villa Street, Mountain View, CA 94041-1194 (415) 961-3300
FAX (415) 961-3966

Dear Colleague:

The Executive Information Systems market is changing fast. The platforms are different. The functionalities demanded by users are different. The kinds of users who want them are different. And the people making the purchase decisions are different.

To succeed with a technology like this one, you need no-nonsense intelligence on how these changes are creating opportunities for companies flexible enough to exploit them.

INPUT's new report *Developments In Executive Information Systems* is designed from the ground up to give you that intelligence. Based on surveys and in-depth telephone interviews with the key players in this market, the report addresses the questions both users and vendors have to have answered to succeed. How is the typical user population expanding? What does EIS technology suggest for the future? How is the LAN/Server platform changing the rules of the game?

Anyone can guess at the answers to these questions, and quite a few research services do so. But only INPUT can give you analysis based on fact and tempered by decades of experience in the computer markets.

So why be content with guesswork? Get the facts—and an incisive analysis of the facts. Order *Developments In Executive Information Systems* today.

Regards,

Doug Tayler

Doug Tayler
Director of Research

ORDER FORM

YES! I have to have the best analysis of the Executive Information Systems markets available today!

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, *Developments in Executive Information Systems* at the fee of $595 each.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:

Card # ______________________________

Exp. date ____________

Name as it appears on my card ______________________________

Signature ______________________________

☐ Bill my company for $ ______________ on purchase order number

________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

Signature

Name

Title

Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

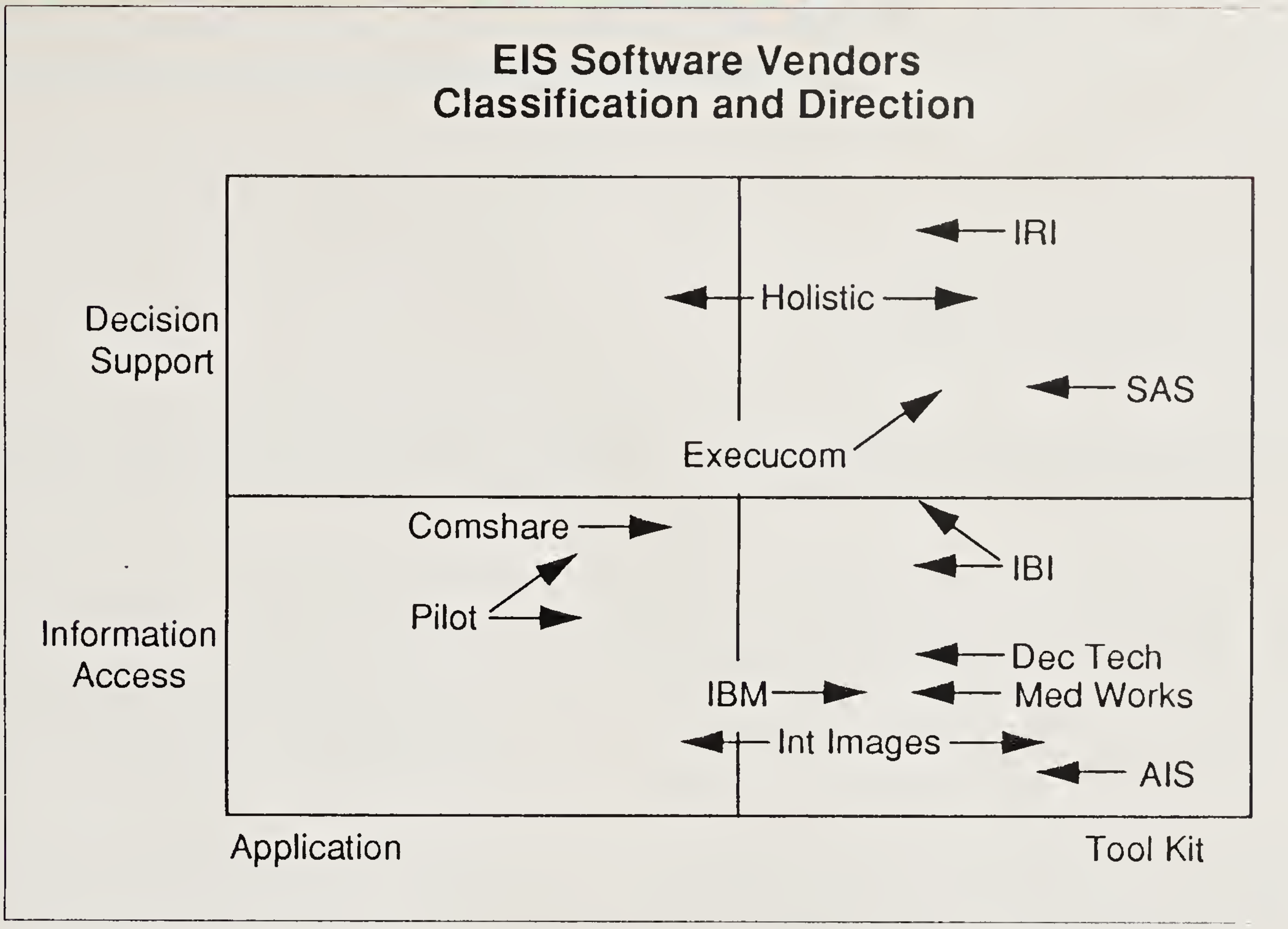
UEIS 8/90

CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person—including parent, subsidiary, or affiliated organizations—without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided.

the requirements not classes of users, but of individuals.

Developments in Executive Information Systems is an invaluable guide for vendors who need to understand the root causes of the market's changes, and how they can capitalize on them; and for users who need to understand the obstacles to EIS implementation. To determine where the technology is headed, INPUT deployed the resources of extensive mail surveys, broad telephone polls, and in-depth, focused telephone interviews of key participants. These survey results answer the following strategic questions:



THE FOCUS AND DIRECTION of the various major EIS vendors is instantly discernible in this diagram from Developments in Executive Information Systems. This is the kind of information that the report supplies on vendor analysis, product analysis, market analysis, and other issues central to your success.

- How is EIS technology changing? How does EIS compare to generalized cooperative processing?
- What is the size of the EIS user population within the typical company, and how will that change over the next five years?
- What are the obstacles to EIS success an how can they be overcome?
- How big is the EIS market now? How big will it get over the next five years? What are the compound annual growth rates of its components?
- How will the professional services component of EIS change over time, both in dollar value and in terms of the types of services required?
- Who are the key software vendors in this market? What are their products? Where are they positioned in the market? What are their strategies for increasing share?

Your Advantage

The EIS game has definitely changed. It is now a significant market, and it also shows definite potential to grow dramatically over the next five years. The EIS users who see the bigger picture; and the EIS vendors who shape their product and service offerings to take advantage of this bigger picture, are the ones who will succeed.

Be one of them. Order your copy of INPUT's *Developments in Executive Information Systems* today!

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco Bay Area
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House, 33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, West Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

How Will You Manage Data Effectively in the 1990s . . . ?

- How is RDBMS technology changing IS operations?
- How can you manage these changes? How will you address integrity and security issues? How will CASE affect you?
- How will the end user's increasing role affect you?

INPUT's New Report Tells You How!

Corporate data is a strategic weapon. If you want targeted intelligence on how changes in data management are changing the way you can use that weapon—and how it can be used against you—you need the best research you can find. You need INPUT's newest report on the world of data management.

Entitled *Data Base Systems Development*, the report addresses the changes sweeping the entire field of data management, showing how those changes will affect how you do business, and offering clear and concise recommendations for future action.

The report is based on a research effort that consumed hundreds of man-hours and tens of thousands of dollars. It is normally priced at $2,000.

Data Base Systems Development
Data Administration: Current Environment
• Background • Changing Environment • Effectiveness of Data Administration • Changing Role • Key Issues
Impacts of Relational Data Base Technology
• Status of Relational DBMS Use • Impacts of RDBMS on Data Administration • RDBMS and the End User
Impact of Other Technologies
• Distributed Data Base Technology • Impact of Network Growth • Role of the Data Dictionary • Data Administration and CASE
Data Management: Future Environment
• Data Management's Role in the Organization • Roadblocks to Success • Planning for the Future
Conclusions and Recommendations

But if you act before August 15, 1990, you'll pay the special price of $200 less than the regular list price for the report—a savings of 10 percent!

For this comprehensive overview and analysis, INPUT interviewed data base managers in Fortune 500 companies to find out directly the current status of data management organizations, DBMS environments, application development, and end-user roles.

This information is not theoretical. It is derived from direct interviews with the people in the data management trenches today. They know how changes in data management will affect your operations, because they're living through those changes in their own operations right now.

INPUT gives you the benefit of their hundreds of man years of experience to help you navigate one of the fastest changing fields in American business today. The report offers insights into how changes in data base management can affect you, including:

- How the overall strategy and direction of information systems in general, and data base management in particular, has serious implications for the scope of your responsibilities.

- How to approach concerns about the security and integrity of data files in a data environment rapidly changing over to distributed data base technology.

- How to decide when to make major technological investments in a market with some of the shortest product life cycles in the industry.

- How to accommodate increasing demand for data access, no matter where or in what format the data resides.

INPUT

1280 Villa Street, Mountain View, CA 94041-1194 (415) 961-3300
Telex 171407 Fax (415) 961-3966

Dear Colleague:

Are you wondering how rapid changes in data management will affect your company and your job over the next few years? Could you use a comprehensive analysis of the impacts of relational data base technology on data management? Would you like to know how the changes in data base systems are rated by your peers, and how they are responding?

INPUT has just released the most detailed and up-to-date report available on data management, entitled ***Data Base Systems Development.*** In it, we analyze in detail the tremendous changes sweeping the data management field, and how those changes are likely to affect you.

The report is based on interviews with data managers in Fortune 500 companies. The information in those interviews can spell the difference between success and failure for you in this rapidly changing field.

You don't have to be satisfied with guesswork about this fundamental challenge to corporations competing in an information economy. You can get answers based on hard data, comprehensive analyses, and thoughtful recommendations for future action.

INPUT's new report offers you all of that. Order it today.

Regards,

R. Dennis Wayson
Vice President

ORDER FORM

YES! I want to manage data effectively in the 1990s! I need INPUT's report on *Data Base Systems Development*.

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, ***Data Base Systems Development*** at the fee of $2,000.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $_______________ to my American Express card:
Card # ______________________________________
Exp. date ______________
Name as it appears on my card ______________________________________
Signature ______________________________________

☐ Bill my company for $ _______________ on purchase order number
____________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

UMDA 7/90

CONDITIONS AGREEMENT

And more. The advent of relational data base technology has had a major impact on traditional data management techniques. And that impact has been amplified by the increasing availability of this sophisticated technology on every conceivable kind of computing platform—not just mainframes, but on departmental minicomputers and on desktop systems.

How do you deal with these changes?
How can you turn them to your advantage?
How will you be able to use the evolution of traditional data management roles to redefine the role of Information Systems?

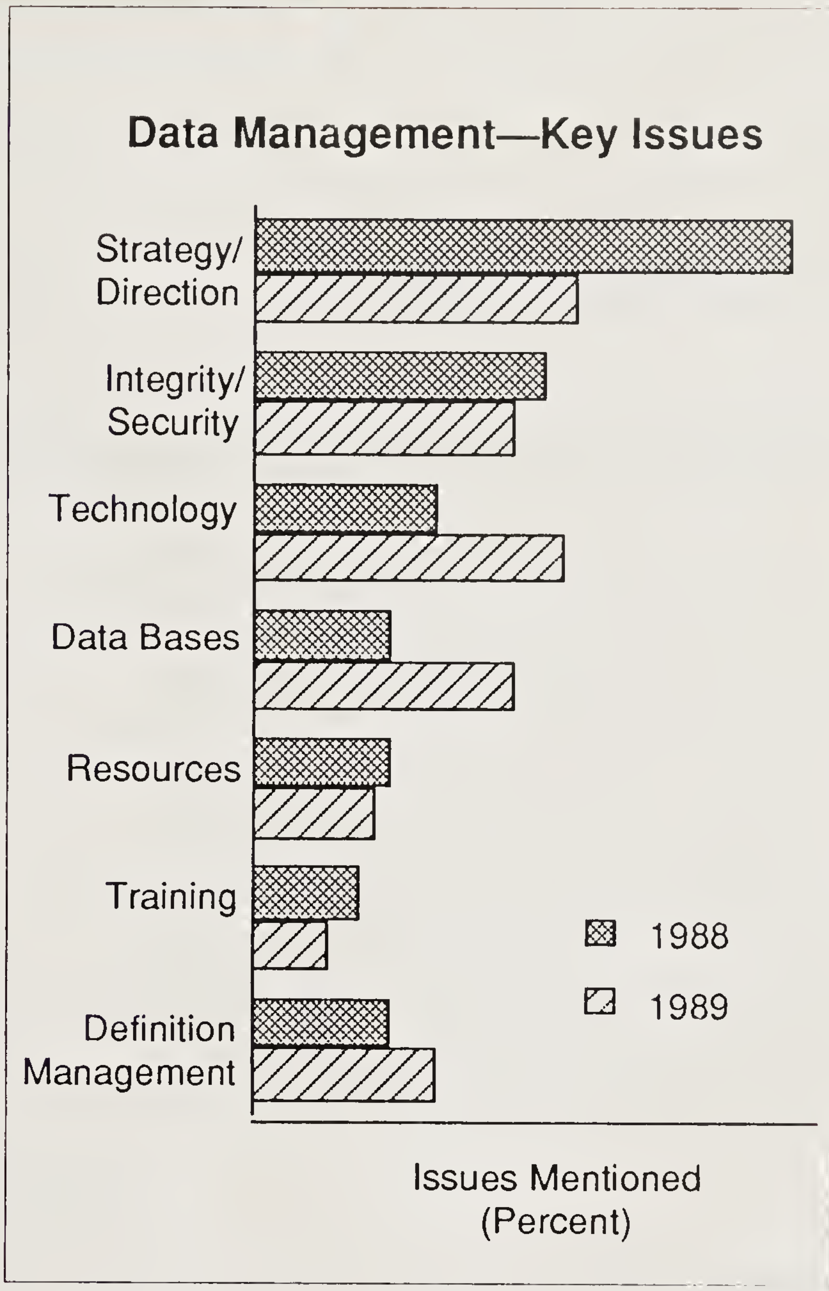
INPUT's report is a comprehensive examination of data management designed to help you do just that. It investigates in detail the questions that you are facing every day, and gives some straightforward recommendations on how to answer them:

- How do you best manage distributed data?
- What are the respective responsibilities of users and IS management for ownership of this data?
- How can you play a central role in managing both technology and growth?
- How do you plan for new technology, and how do you smoothly introduce it into existing environments?
- What role does corporate management play in supporting the data management process and how can you get them more involved?

There are also chapters on the impact of other data base technologies, the current environment for data administration, and the future of data management.

INPUT's *Data Base Systems Development* is written for managers in the data management trenches with responsibilities for managing a complex and rapidly changing technological and organizational evolution. It's filled with exhaustive research, insightful analysis, and clear recommendations. And we have a copy of the report waiting for you now.

All you have to do is fill out the enclosed order form and drop it in the mail today.



THESE ARE THE ISSUES singled out by the data managers interviewed for INPUT's report. The rapid technological and management changes in this area are evident in several responses.

Call, fax, or mail your order to INPUT
to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco Bay Area
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House, 33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
6306 Langgöns-Niederkleen, West Germany

Tokyo
Saida Building, 4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

If You Need the Best Available Analysis of Executive Information Systems Today . . .

- ▲ What are the New Ten Commandments of EIS?
- ▲ Who are the major players?
- ▲ What are the technological trends?
- ▲ How big is the market?
- ▲ How do you succeed with EIS?

. . . INPUT Can Put that Analysis at Your Fingertips Now!

A new INPUT report on Executive Information Systems clarifies the emerging opportunities and tremendous potential in this new, fast-growing, and sometimes confusing market.

And if you act before September 30, 1990, you can have the report for $60 less than the regular list price—a savings of 10 percent!

Executive Information Systems (EIS) are the vendor community's attempt to storm what has been a citadel of computer resistance—executive desktops.

The technological foundations of EIS have changed dramatically, with mainframe systems being supplanted by personal workstations, local and wide area network capabilities, and relational data bases with high-level programming tools. But the goal has remained essentially the same: to provide executives who are essentially computer illiterate with a flexible, easy-to-use tool for rapid, ad hoc access to information of all kinds.

Developments in Executive Information Systems
EIS—Past and Future
• Prior to 1990 • EIS—A Definition • After 1990
The User View
• Demographics • Status and Activity • Lessons Learned • Planning for the Next Wave • The Value of EIS
The Vendor View
• Market Structure • Key Software Vendors • The Changing Market • Market Forecast
Conclusions and Recommendations

EIS Answers

With INPUT's report on *Developments in Executive Information Systems*, users and vendors now have access to the results of a months-long, in-depth research effort designed specifically to determine the exact characteristics of the EIS arena, and how you can shape your development or marketing efforts to take advantage of the opportunities emerging there.

The report analyzes the following questions in detail:

- What are the new Ten Commandments of EIS development and marketing?
- Who are the new sponsors of EIS development, and who makes the purchase decisions?
- What are the relative degrees of importance given by users to 13 different subapplications and categories of data in EIS?
- In what specific ways does EIS differ from traditional systems, and how can you exploit those differences?
- What types of users are in the wings, how should you plan to meet their needs?
- What do users and sponsors say they want out of EIS?
- What job titles and functional areas use EIS today? How will that change over next 18 months?
- What is the relative importance of the goals of timeliness, quality of information, support of management process, and use of information technology, according to executive users?
- What are the typical development times for EIS?
- What is the initial total investment, including software and staff?
- Where are the trendlines headed in pricing?

INPUT answers these and many of the other questions that will have a direct, practical bearing on your success in penetrating this final frontier of corporate computer use.

An Invaluable Guide

In addition to these specific issues, INPUT focuses its research in this report on some of the broader questions surrounding Executive Information Systems. The EIS market is in a constant state of upheaval because of the rapid technological developments that continue to change the basic platform, and because in the final analysis, EIS must be constantly adapted to fit

INPUT®
1280 Villa Street, Mountain View, CA 94041-1194 (415) 961-3300
FAX (415) 961-3966

Dear Colleague:

The Executive Information Systems market is changing fast. The platforms are different. The functionalities demanded by users are different. The kinds of users who want them are different. And the people making the purchase decisions are different.

To succeed with a technology like this one, you need no-nonsense intelligence on how these changes are creating opportunities for companies flexible enough to exploit them.

INPUT's new report *Developments In Executive Information Systems* is designed from the ground up to give you that intelligence. Based on surveys and in-depth telephone interviews with the key players in this market, the report addresses the questions both users and vendors have to have answered to succeed. How is the typical user population expanding? What does EIS technology suggest for the future? How is the LAN/Server platform changing the rules of the game?

Anyone can guess at the answers to these questions, and quite a few research services do so. But only INPUT can give you analysis based on fact and tempered by decades of experience in the computer markets.

So why be content with guesswork? Get the facts—and an incisive analysis of the facts. Order *Developments In Executive Information Systems* today.

Regards,

Doug Tayler

Doug Tayler
Director of Research

ORDER FORM

YES! I have to have the best analysis of the Executive Information Systems markets available today!

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, *Developments in Executive Information Systems* at the fee of $595 each.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ____________ to cover the cost of my order.

☐ Charge $____________ to my American Express card:

Card # ______________________________

Exp. date ____________

Name as it appears on my card ______________________________

Signature ______________________________

☐ Bill my company for $ ____________ on purchase order number

________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

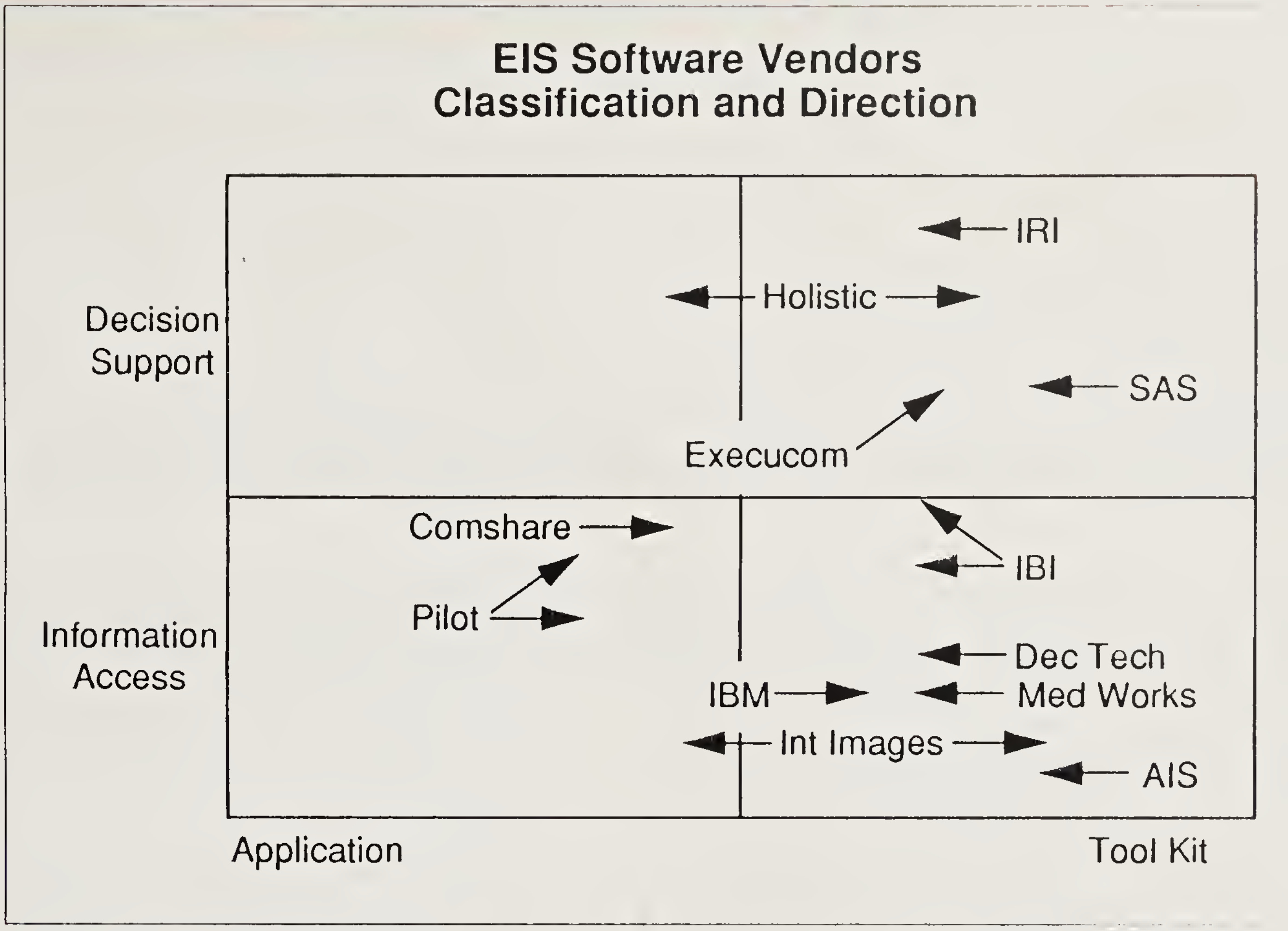
INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

UEIS 8/90

CONDITIONS AGREEMENT

the requirements not lasses of users, but of individuals.

Developments in Executive Information Systems is an invaluable guide for vendors who need to understand the root causes of the market's changes, and how they can capitalize on them; and for users who need to understand the obstacles to EIS implementation. To determine where the technology is headed, INPUT deployed the resources of extensive mail surveys, broad telephone polls, and in-depth, focused telephone interviews of key ticipants. These survey results answer the following strategic questions:



THE FOCUS AND DIRECTION of the various major EIS vendors is instantly discernible in this diagram from Developments in Executive Information Systems. This is the kind of information that the report supplies on vendor analysis, product analysis, market analysis, and other issues central to your success.

- How is EIS technology changing? How does EIS compare to generalized cooperative processing?
- What is the size of the EIS user population within the typical company, and how will that change over the next five years?
- What are the obstacles to EIS success an how can they be overcome?
- How big is the EIS market now? How big will it get over the next five years? What are the compound annual growth rates of its components?
- How will the professional services component of EIS change over time, both in dollar value and in terms of the types of services required?
- Who are the key software vendors in this market? What are their products? Where are they positioned in the market? What are their strategies for increasing share?

Your Advantage

EIS game has definitely changed. It is now a significant market, and it also shows definite potential to grow dramatically over the next five years. The EIS users who see the bigger picture; and the EIS vendors who shape their product and service offerings to take advantage of this bigger picture, are the ones who will succeed.

Be one of them. Order your copy of INPUT's *Developments in Executive Information Systems* today!

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco Bay Area
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House, 33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, West Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

Are You Ready for Outsourcing . . . ?

- How can you make the Go/ No Go decision?
- What are the rewards? The pitfalls?
- How big is the market?
- What kinds of companies have succeeded best?
- How should you structure outsourcing relationships?
- How will outsourcing change your organization?

Get Ready—Get the Answers—With INPUT's New Report!

The potential rewards of outsourcing are tremendous. But so are the risks. A new report from INPUT entitled *Information Systems and Outsourcing—A Strategic Assessment* puts outsourcing in perspective by giving IS management and vendors a crisp analysis of risk and reward potential *in the context of today's information environment!*

Analyses of the major outsourcing vendors, the increasing role of professional services, contract and personnel pitfalls, market size and growth rates, and a comprehensive conceptual framework IS management can use to evaluate outsourcing on a case-by-case basis—these are all provided by INPUT's report. But the report also covers a historical perspective on outsourcing, major market forces, vendor selection criteria, organizational impacts, analyses of vendors and their strategies, and more.

Information Systems and Outsourcing A Strategic Assessment
Outsourcing—Past and Present
• A Historical Perspective • What Is Different • A Working Definition
Information Systems Perspectives
• Driving Forces • IS Organization in the 1990s • Information Systems Strategy and Outsourcing • Outsourcing Opportunities
Outsourcing and Vendor Capabilities
• Vendor Categorization • Systems Operations and Systems Integration • Vendor Support for Organizational Issues • Vendor Capabilities • Outsourcing and Systems Management
Outsourcing—Decision and Selection
• Outsourcing Decision Factors • Client/Vendor Relationship • Vendor Selection • Managing the Vendor • Organizational Impacts • Insourcing • Information Systems Outsourcing Benefits
Conclusions and Recommendations

And if you act before September 30, 1990, you'll pay $150 less than the regular list price for the report—a savings of 10 percent!

There is no question that outsourcing represents a major shift in focus for both vendors and users. The only question is who will benefit most. We believe that to exploit the outsourcing opportunity requires the most comprehensive information and the best analysis available. *Information Systems and Outsourcing—A Strategic Assessment* is researched and written to give you exactly that.

Adding Value

Ever since Kodak contracted out for the majority of its information systems function, companies have been wondering how they might reconfigure their IS effort to allow them to concentrate on the area where they add the most value: the architecture, planning, and implementation of strategic systems. INPUT's report tackles that issue, along with others like:

- What are the key benefits to be derived from the five basic categories of outsourcing?
- What are the various types of outsourcing relationships and what are their advantages and disadvantages?
- What are the pitfalls in managing the ongoing vendor relationship?
- What are the key factors in analyzing whether you should outsource?
- What kind of organizational impacts can you expect from an outsourcing relationship?
- How can you define *business* objectives for outsourcing relationships?
- How can you structure these agreements to give your company the greatest possible benefit?
- How can you resolve the inherent conflict in the perspectives of the organization and the IS department?
- How will the major market forces of globalization, increasing rate of business change, and specialization affect the outsourcing trend?

In short, INPUT's report examines all of the pressures related to outsourcing, and analyzes in detail how they are likely to transform the IS organization in the 1990s.

ORDER FORM

YES! I need to get ready for outsourcing! I need the research and insights of INPUT's new report on *Information Systems and Outsourcing—A Strategic Assessment.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me _______ copy (copies) of INPUT's report, *Information Systems and Outsourcing—A Strategic Assessment,* at the fee of $1,495 each.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:

Card # ______________________________________

Exp. date ____________

Name as it appears on my card ______________________________

Signature ______________________________________

☐ Bill my company for $ ______________ on purchase order number ___________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:	Accepted By INPUT:
Organization	Signature
Name	Name
Title	Title
Address	Date
Telephone	
Signature / Date	

(SEE TERMS OTHER SIDE)

UIOUT 8/90

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

e Vendor View

But INPUT does not stop there. Our researchers also provide valuable information on outsourcing vendors, the market they play in, and how their product and service offerings are being forced to evolve. The report answers your questions about:

- How big is the market now, how fast is it growing, and how big will it be for each of the next five years?
- What are the outsourcing strategies of eight key competitors in this field?
- How do outsourcing buyers rate various vendor capabilities in order of importance?
- Where are the best outsourcing opportunities today? Where will they be in the near future? What are the forces driving the market in that direction?
- What types of outsourcing relationships are becoming common among users and vendors?
- How is the willingness of users and buyers to make longer-term commitments to outside vendors for larger contracts affecting the outsourcing market?

And other questions you have to have answered if you are going to be able to shape your business so that you can reap outsourcing's rewards.

Outsourcing Benefits

Outsourcing Category	Benefits						
	Costs		Skills Access	Rapid Response	Use of Skills		Management Time
	Oper.	Cap.			Vendor	IS	
Applications management	X	X	X	X	X	X	X
Systems operations	X	X	X	X			X
Transition management			X	X	X	X	X
Applications maintenance	X			X		X	X
Systems integration			X	X	X		X

THE FIVE BENEFITS of outsourcing are used to form a matrix with the five different outsourcing categories to help IS management determine where the best opportunities lie for their companies.

That's why INPUT's report on *Information Systems and Outsourcing—A Strategic Assessment* can be so valuable for you. We put all of the resources of our sophisticated research infrastructure behind the effort to come up with information on this subject. And then we put some of the finest minds in the business to work on it to come up with incisive analysis and clear, practical recommendations for action.

Why not put this powerful research and analysis to work for you? Use the enclosed order form to order your copy of *Information Systems and Outsourcing—A Strategic Assessment* today.

Clear, Practical Recommendations

Never has an issue had so much potential to change the way you do business. Never has an issue involved so many different aspects of information management. Never has an issue carried so many possible benefits, or had the potential for negative impacts.

Outsourcing is unique. And you can't just ignore it. IS managers and vendors are going to be forced to make a conscious decision on what to do about outsourcing.

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House, 33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, West Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

Information Systems Industry

Customer Service Program—U.S.

Customer Service Program—U.S.

EFFECTIVE PLANNING FOR EFFECTIVE PERFORMANCE

The Customer Service Program—U.S. evaluates, projects, and recommends changes in the computer equipment maintenance and software support fields. It emphasizes the determination of user needs and vendor performance in meeting these needs.

Through research-based studies and support services the program provides information you need to forecast service requirements, analyze competition, and address the challenges of new technology.

SCOPE

The program provides an overall examination of the computer customer service industry through a major market report, user requirements reports, vendor analysis reports, newsletters, and support services. It contains four modules, each of which addresses one segment of the industry in detail:

Large Systems
Midrange Systems
PCs/Workstations
Third-Party Maintenance

Based on your needs, you may select all or any combination of the four modules.

"CUSTOMIZED" CUSTOMER SATISFACTION SURVEY

INPUT conducts a customer satisfaction survey for each subscribing company. INPUT surveys up to fifty customers from names you provide. You receive a proprietary report, and the data is incorporated into INPUT's data base.

CUSTOMER SERVICE MARKET REPORT

This major report:

- Presents forecasts of user expenditures for service for each market category
- Examines key customer service issues
- Identifies trends that could help or hinder success
- Pinpoints new opportunities for service revenue
- Recommends specific action to increase revenue

CUSTOMER SERVICE USER REQUIREMENTS REPORTS

Four Customer Service User Requirements Reports are produced: Large Systems, Midrange Systems, PCs/Workstations, and Third-Party Maintenance (TPM). Each report measures the importance of service components and user satisfaction with vendor performance for:

- Equipment maintenance
- Software support
- Professional services
- Education and training services
- Documentation

CUSTOMER SERVICE VENDOR ANALYSIS REPORTS

Four Customer Service Vendor Analysis Reports are produced: Large Systems, Midrange Systems, PCs/Workstations, and TPM. Each report:

- Profiles key service vendors
- Analyzes service discounting, warranty, and pricing practices and trends
- Addresses marketing tactics and strategies
- Examines specific service offerings

INPUT®

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "Hotline" Inquiry Service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.

Customer Service Newsletter
Questions posed by our clients through the "Hotline" Inquiry Service along with answers are reported. Current topics in the U.S. and Europe in customer service are analyzed—e.g., new vendor pricing strategies or service offerings.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

Customer Service Conference
INPUT analyses and forecasts are presented and discussed. Vendor strategies and key industry trends will be presented.

Joint Client Conference
This annual conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as to meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- Customer Service Program—Europe covers the European equipment and software maintenance and support industry.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

CUSTOMER SERVICE MARKET REPORT

- Contains Market Forecasts (1989-1994)
- Customer Service Market Categories:
  - Large Systems
  - Midrange Systems
  - PC/Workstations
  - Third-Party Maintenance

LARGE SYSTEMS MODULE

- User Requirements Report
- Vendor Analysis Report

MIDRANGE SYSTEMS MODULE

- User Requirements Report
- Vendor Analysis Report

PCs/WORKSTATIONS MODULE

- User Requirements Report
- Vendor Analysis Report

THIRD-PARTY MAINTENANCE MODULE

- User Requirements Report
- Vendor Analysis Report

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Visit
- Customer Service Newsletter
- Customer Service Conference
- Joint Client Conference

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information systems industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications services, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
Parsippany Place Corp. Center
Suite 201
959 Route 46 East
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
8298 Old Courthouse Road
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
29 rue de Leningrad
75008 Paris, France
(16) 44-80-48-43 Fax (16) 44-80-40-23

Japan
FKI, Future Knowledge Institute
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-4026 Fax (03) 864-4114

INPUT®

Software and Services Industry

Customer Service Program—International

Customer Service Program—International

This is the first integrated program which analyses and reports on the customer service performance, developments and issues for both the U.S. and Europe.

CUSTOMER SERVICE MARKET REQUIREMENTS REPORTS

The four reports described below will be prepared in 1990. These reports are a continuation of similar reports produced since the early 1980s and uniquely put current developments into perspective.

- **Customer Service Market Report**

  This report presents analysis and forecasts of user expenditure for service for each market sector. It examines key customer service issues and identifies trends and opportunities in the U.S. and European market-place.

- **Customer Service User Requirements Report**

  Customer Service User Requirement reports discuss customer satisfaction with vendor performance service. Three reports are produced:

  - Large Systems
  - Midrange Systems
  - PC/Workstation

CUSTOMER SERVICE ISSUE REPORTS

The 1990 Program includes four special issue reports as follows:

- **Local Area Network Support**

  This report addresses the service needs of this fast-growing area and examines vendor responses to rapidly changing user needs.

- **Independent Maintenance**

  INPUT continues to track the fast-growing independent maintenance sector in this report which examines user attitudes to independent maintenance as well as vendor activity.

- **Customer Service Pricing**

  This report examines customer perceptions and trends in pricing for both hardware maintenance and systems software support and maintenance.

- **Professional Service Opportunities**

  Increasingly, customer services operations are providing additional people-related services. This report examines the developing high-growth opportunities ancillary to the prime equipment support functions of customer service.

INPUT®

EFFECTIVE PLANNING FOR EFFECTIVE PERFORMANCE

INPUT's Customer Service Program provides the detailed customer service information you need to forecast service requirements, analyse competition, and address the challenges of new technology.

You receive research-based studies and support services which address questions such as:

- What services do your users really require and how can you meet their needs most efficiently?
- What is the competition doing and how should you respond?
- Where are the sources of service revenue growth for the next five years?
- How will increases in hardware reliability and software complexity affect your personnel mix?
- What are the new service techniques and how are they being received in the marketplace?

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
This service provides fulfillment of short-term research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.

On-Site Visits
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

Client Meetings
Consultants confer in person or by telephone with clients on business market issues.

Monthly Customer Service Newsletter
Topical news is provided about customer service in the United States and Europe (e.g., new vendor service policies, service offerings, vendor performance).

RELATED SERVICES

- Custom Research and Consulting projects analyse market opportunities, user needs, competitive environment, acquisition targets, etc.
- Market Analysis Program covers the entire information services and software market for customer services organizations seeking to offer innovative products and service.
- Systems Integration and Systems Operations Programs (U.S.) and Systems Management Programme (Europe) for customer service organizations offering or considering offering expanded services.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-4026 Fax (03) 864-4114

Customer Service Program—U.S. (CSP) 1990 Program

Reports	Vendor Profiles	Client Support
Customer Service and Support Market Forecast, 1990-1995	20 Leading Equipment Vendors	Customer Service Newsletter (bimonthly)
User Service Requirements Studies - Large-Systems - Midrange Systems - PC/ Workstations	9 Major TPMs 4 Major Dealers	"Hotline" Inquiry Service On-Site Presentation (excluding travel)
Issue Studies - Analysis of U.S. Service Offerings - Local Area Network Support—User Requirements - Analysis of User Help Desk Offerings	Each Profile Includes: - Service Offerings - Dealer Support - Pricing Trends - Strategic Directions - Support Structures - Revenues - Employees - Service Locations	Customer Service Conference Access to INPUT Information Centers . . . . INPUT annual Executive Conference (optional; reduced fee)

INPUT®

Information Systems Industry

Customer Service Program—U.S.

Customer Service Program—U.S.

EFFECTIVE PLANNING FOR EFFECTIVE PERFORMANCE

The Customer Service Program—U.S. evaluates, projects, and recommends changes in the computer equipment maintenance and software support fields. It emphasizes the determination of user needs and vendor performance in meeting these needs.

Through research-based studies and support services the program provides information you need to forecast service requirements, analyze competition, and address the challenges of new technology.

SCOPE

The program provides an overall examination of the computer customer service industry through a major market report, user requirements reports, vendor profiles, special issue reports, newsletters, and support services.

SPECIAL ISSUE REPORTS

In 1990 INPUT will produce three special issue reports as follows:

Analysis of U.S. Service Offerings
This report describes and compares the offerings and the terms and conditions of various vendors. It also provides an analysis of the overall strategic directions of the marketplace relative to offerings.

Local Area Network Support—User Requirements
This report will be based on data obtained from INPUT user surveys. It will examine the customer needs in this fast growth area and the acceptance trends of the new offerings for customers using local area networks (LANs).

Analysis of User Help Desk Offerings
This report will be based on data obtained from INPUT user surveys. It will examine user needs for help desk support and the acceptance trends of the new offerings supporting the help desk function.

CUSTOMER SERVICE MARKET REPORT

This major report:

- Presents forecasts of user expenditures for service for each market category
- Examines key customer service issues
- Identifies trends that could help or hinder success
- Pinpoints new opportunities for service revenue
- Recommends specific action to increase revenue

CUSTOMER SERVICE USER REQUIREMENTS REPORTS

Three Customer Service User Requirements Reports are produced: Large Systems, Midrange Systems, and PCs/Workstations. Each report measures the importance of service components and user satisfaction with vendor performance for:

- Equipment maintenance
- Software support
- Ancillary serv ices
- Education and training services
- Documentation

CUSTOMER SERVICE VENDOR PROFILE REPORTS

Profiles are produced on 20 major hardware vendors, nine major third-party maintenance vendors, and four major dealer organizations. Each profile:

- Analyzes service discounting, warranty, and pricing practices and trends
- Addresses marketing tactics and strategies
- Examines specific service offerings

INPUT®

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "Hotline" Inquiry Service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.

Customer Service Newsletter (Bimonthly)
Questions posed by our clients through the "Hotline" Inquiry Service along with answers are reported. Current topics in the U.S. and Europe in customer service are analyzed—e.g., new vendor pricing strategies or service offerings.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

Customer Service Conference
INPUT analyses and forecasts are presented and discussed. Vendor strategies and key industry trends will be presented.

This annual conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as to meet senior staff from other INPUT clients.

RELATED SERVICES

- Customer Service Program—Europe covers the European equipment and software maintenance and support industry.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM SUBSCRIPTION OPTIONS

Based on your needs, you may select one, two, or three subscription options as follows:

MODULE 1

- Market analysis report
- Choice of 11 vendor profiles
- Choice of one user requirements report
- Choice of one special issue report
- Client support

MODULE 2

- Market analysis report
- Choice of 22 vendor profiles
- Choice of two user requirements reports
- Choice of two special issue reports
- Client support

MODULE 3

- Market analysis report
- All 33 vendor profiles
- All three user requirements reports
- All three special issue reports
- Client support

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT's 1990 Customer Service Program—U.S.

Yes!
Please enter my order as described:

Program subscription options:

❑	Module One (see back for report selections)	$11,500
❑	Module Two (see back for report selections)	$20,000
❑	Module Three (all reports included)	$28,000

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning ____________. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

❑ Enclosed is my check in the amount of $________________.

❑ Bill my company on purchase order number ______________ in the amount of $________________.

Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

1288S-CSP 12/89

INPUT's 1990 Customer Service Program—U.S.
Research Report Selection

Check your selections according to the module you have chosen:

Module One	Market analysis report 11 vendor profiles One user requirement report One special issue report Client support
Module Two	Market analysis report 22 vendor profiles Two user requirement reports Two special issue reports Client support
Module Three	(No selection required—all reports included)

VENDOR PROFILES

Vendors

- ☐ Amdahl Corp.
- ☐ Apple Computer, Inc.
- ☐ AT&T
- ☐ Bull-HN
- ☐ CDC
- ☐ Compaq
- ☐ Concurrent Computer Corp.
- ☐ Convex Corp.
- ☐ Data General Corp.
- ☐ DEC
- ☐ Hewlett-Packard
- ☐ Hitachi Data Systems
- ☐ IBM
- ☐ NCR
- ☐ Prime Computer, Inc.
- ☐ Stratus Computer, Inc.
- ☐ Sun Microsystems, Inc.
- ☐ Tandem Computers, Inc.
- ☐ Unisys
- ☐ Wang

TPM

- ☐ Bell Atlantic Fourth Party
- ☐ Dataserv
- ☐ Decision Data Service, Inc.
- ☐ GE Computer Services
- ☐ Grumman Systems Support
- ☐ Idea Servcom
- ☐ Intelogic Trace
- ☐ Sorbus
- ☐ TRW Inc.

Dealers

- ☐ Businessland
- ☐ Computerland
- ☐ Entree
- ☐ Tandy Corp.

USER REQUIREMENTS REPORTS

- ☐ Large Systems
- ☐ Midrange Systems
- ☐ PC.Workstations

SPECIAL ISSUE REPORTS

- ☐ Analysis of U.S. Service Offerings
- ☐ Local Area Network Support —User Requirements
- ☐ Analysis of User Help Desk Offerings

Customer Service Program—U.S. (CSP) 1990 Program

Reports	Vendor Profiles	Client Support
Customer Service and Support Market Forecast, 1990-1995	20 Leading Equipment Vendors	Customer Service Newsletter (bimonthly)
User Service Requirements Studies - Large-Systems - Midrange Systems - PC/ Workstations	9 Major TPMs	"Hotline" Inquiry Service
Issue Studies - Analysis of U.S. Service Offerings - Local Area Network Support—User Requirements - Analysis of User Help Desk Offerings	4 Major Dealers	On-Site Presentation (excluding travel)
	Each Profile Includes: - Service Offerings - Dealer Support - Pricing Trends - Strategic Directions - Support Structures - Revenues - Employees - Service Locations	Customer Service Conference Access to INPUT Information Centers . . . . INPUT annual Executive Conference (optional; reduced fee)

INPUT®

Information Services Industry

Electronic Data Interchange Program—U.S.

Electronic Data Interchange Program—U.S.

PLAN FOR SUCCESS

INPUT's EDI Program is a continuing service that provides timely and accurate intelligence on this quickly growing business area. How much you know about EDI, and when you find out, could spell the difference between success or failure in your EDI endeavors.

ANALYSIS REPORTS

EDI Forecast and Trends, 1990-1995
Based on in-depth interviews with EDI users and vendors, this annual report overviews the issues, trends, and size of the EDI market. The report examines EDI use by industry, estimates total user expenditures for EDI software, network services, and professional services; lists the top vendors in the market and their market share; and forecasts the market through 1995.

EDI Implementation Issues
Examines the impact of EDI on systems and business methods, its integration with other technologies such as bar coding, its impact on accounting and auditing procedures, its restructuring of clerical and managerial work, and its restructuring of and adaptation to existing business environments. Based on case studies.

Financial Services and EDI
Examines the increasingly critical EDI component of electronic payment. Outlines the issues, the service providers, and the services, and how companies are adopting them. Also looks at other financial service companies adopting EDI, including insurance and mortgage lending.

VENDOR PROFILES

Loose-leaf binders to support frequent detailed updates on:

- Network Service Providers
- Software Providers
- Professional Service Providers

EDI STANDARDS REFERENCE GUIDE

This compendium of EDI standards in U.S., Europe, and other geographic sectors is constantly updated. It provides a reference guide to relevant standards, significant changes, and responsible standards organizations.

EDI REPORTER NEWSLETTER

The latest information on vital EDI issues, events, vendor actions, and user experiences is presented in this monthly, international newsletter. First published in early 1987, *EDI Reporter* has become the most relied-upon source of timely EDI information.

INPUT®

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.

Client Conference
This annual conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as to meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- Multinational network studies provide information for planning and operating multinational telecommunications networks.
- Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Europe.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

EDI ANALYSIS REPORTS

- EDI Forecast and Trends, 1990-1995
- EDI Implementation Issues
- Financial Services and EDI

VENDOR PROFILES

- Network Service Providers
- Software Providers
- Professional Service Providers

EDI STANDARDS REFERENCE GUIDE

- U.S., Europe, and Other Areas
- Standards Organizations
- Standards and Changes

EDI REPORTER NEWSLETTER

- Monthly
- Issues, Events, Interviews
- Users, Vendors
- International Scope

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- Client Conference*

* Available at a reduced rate

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®
EDI
Reporter
INTERNATIONAL

A Monthly Publication from INPUT's **EDI Program**

Vol. 5 No. 11 November 1990

IN THIS ISSUE:

EDI Brings Finance and Logistics Together at Cass

It is a commonplace truism that logistics and finance are two indispensable functions of commerce. Services that secure and allocate capital and those that transport physical goods through value chains are fundamental to all sectors of an economy. Both kinds of services, as they typically involve transactions among multiple parties, also share the characteristic of being highly amenable to electronic data interchange. Currently, logistics companies have a lead on finance companies in adopting EDI.

A single third party that offers both logistics and financial support to companies is in a strong strategic position because it can play such a central role in a customer's business. Moreover, using EDI to service customers would add further edge to an already competitive strategy.

One such company is **Cass Commercial Corporation** (St. Louis, MO). This holding company has two subsidiaries: **Cass Logistics, Inc.** and **Cass Bank & Trust Company**. Cass Logistics provides transaction processing, application software, and associated professional services for integrated logistics management. Along with its sister company Cass Bank, it provides electronic freight payment services. By acting as a financial and information intermediary between a company that ships freight and a company that carries it, Cass Commercial makes its money in processing fees and interest income.

Literally, it sometimes makes interest income on money collected on behalf of its carrier customers. Typically a freight bill payment is initiated when a shipper sends a shipping notice to Cass. Cass rates the notice. In other words, using lookup tables (based, in part, on Rand McNally's MileMaker software), Cass calculates the cost of shipping based on distance and

Continued on next page

EDI, Cass... from page 2

weight. It then draws funds from the shipper's account (if the shipper has an account at Cass Bank). It cuts and sends a check to the carrier with remittance detail. In the case where the carrier keeps its funds with Cass Bank & Trust, Cass may be entitled to keep the money for a few days until the federally regulated payment date arrives. Those extra days allow Cass to move that capital into interest-earning ventures. Because of this opportunity, Cass structures its fee schedule to favor early payment by shippers, in effect, sharing its interest income with them. All processing arrangements and fees are established according to the individual needs and capabilities of each client.

Cass can handle all transmissions—from receipt of ship notice to funds transfer—entirely electronically, even for shippers and carriers who patronize other banks. It sends all remittance details, however, by mail.

In addition to handling freight payments, Cass also provides other information services. It can send daily, weekly or monthly reports to shippers that itemize transportation transactions and expenses. Cass will allocate transport costs to specific company product lines, weight, cubic displacement, or destination routes. It can advise shippers on how to consolidate their shipments more effectively to minimize expenses.

TDCC, X12, ACH (Automated Clearinghouse), RJE (Remote Job Entry) and a variety of proprietary linkages allow Cass to receive and send the data among clients and banks.

Cass Logistics' integrated freight payment, freight audit, rating, and software systems permit its clients to outsource the accounting and control of their logistics costs. In some cases, Cass processes information on the movement of materials and supplies into production, work-in-process transfers, movement of finished products to distribution centers, storage, handling, and delivery to the point of sale in general ledger accounting detail.

For 1989, Cass Commercial Corporation reported total operating income of $32.6 million and net income of $5.4 million. Approximately 80% of Cass Logistics' revenue is derived from processing services, 10% from application software product licenses (at customer sites), and 10% from professional services.

Cass Logistics' freight payment and freight audit processing services are supported by redundant Tandem NonStop computers located in St. Louis, MO, and Columbus, OH. Cass Logistics processes 18 million transactions annually, with a value exceeding $4 billion, for more than 700 manufacturers and distributors.

Contact: Robert Delaney, Vice President, Marketing, Cass Logistics, St. Louis, MO, 314-621-4121. ■

US Sprint to Spawn EDI Switches with Its Licensees

Market Its Own EDI Service

US Sprint (Reston, VA) will market EDI systems to large-scale network service providers worldwide, as well as offer an EDI service based on its own computer facilities. Sprint (formerly Telenet) had offered EDI services by reselling **Sterling Software's** Ordernet service, but this agreement is not being renewed.

With the lapsing of the Sterling agreement, Sprint is now selling software and interconnection services to companies (most of whom are Post Telephone and Telegraph authorities) that want to offer an EDI service to corporations. Sprint has entered into an agreement with **Harbinger*EDI Services Inc.** (Atlanta, GA) in which it will resell Harbinger's EDI switch software and customer-premise PC software under the Sprint label.

Sprint's strategy is to add further messaging—specifically EDI—capabilities to its licensees' services. Already 26 licensees (including **BellAtlantic, Bell South, and Telecom Canada**) offer Sprint's Telemail service. Telemail is an E-mail and fax store-and-forward service. Using the Harbinger software, Sprint will be able to provide those licensees with EDI switch-

ing services. Both Telemail and the Harbinger EDI switch software run on Tandem computers.

Sprint itself will install the Harbinger switch software at its headquarters in Reston, VA. And, with relabeled Harbinger EDI PC software, it will sell EDI services directly to corporate clients.

The marketing effort will initially concentrate on Sprint's licensees, according to **Michael Mansouri**, US Sprint's executive director of messaging systems and EDI marketing.

Sprint will sell the Harbinger EDI switch software to licensees for $500,000 to $1 million, depending on configuration. Sprint will also sell the Harbinger software to corporate user sites for approximately $30,000, according to Mr. Mansouri. Sprint will continue selling Sterling Software's Gentran EDI translation software to corporate users.

The roll-out of EDI switching services on top of its Telemail services with its licensees could give Sprint a strong international presence for EDI networking. With compatible, interconnected EDI switches running in different regions around the world, Sprint EDI users will benefit from international access/reach, uniform pricing structures, and management control reporting options for multinational customers.

According to Mr. Mansouri, Sprint chose to align with Harbinger and let the arrangement with Sterling lapse because, in part, Harbinger's software runs on Tandem computers, which is where Sprint's expertise lies. All of Sprint's Telemail installations run on Tandem, and SprintNet's hub in Reston has more than 100 Tandems.

Source: Michael Mansouri, Executive Director of Messaging Systems and EDI Marketing, US Sprint, Reston, VA, 703-689-5443. ■

EDI in Japan: Update

The appointment of an EDIFACT rapporteur for Japan (September) is just one more indication that Japan is aligning its EDI to world standards and formalizing its current hodgepodge of proprietary EDI systems. INPUT's Tokyo office, under the direction of Tetsuo Imai, brings us the following update on the status of EDI in Japan.

The liberalization of the telecommunications business in 1985 opened up the value-added network business to the private sector. The number of VANs in Japan increased rapidly—and today, almost 800 exist. These companies provide various kinds of VAN services. Forty percent of them provide EDI, and EDI is the fastest growing service of VANs that provide it.

There are about 750 EDI systems—most of them a network centered on a large enterprise, with customers and suppliers connected to it. Data formats are based on the system architectures of the central enterprise.

Transmission protocols are not as varied as electronic data formats. Usually, they are one of the following three:

- Telecommunication protocol determined according to the central company's computer architecture
- Japan Chainstore Association protocol (JCA)
- ZENGIN protocol, developed by the Federation of Bankers Associations of Japan

Since the mid-eighties, the trend in Japanese computer utilization has changed from local, standalone use to intra- and intercompany/interindustry, national network use. The explosion of the VAN business in Japan has resulted in the creation of on-line systems, and systems for various types of information processing. In consumer goods distribution, VAN service providers have introduced on-line systems for interchanging purchase order and order-received data among manufacturers, wholesalers, agents, and retailers. In petrochemicals, VAN services allow for the electronic dissemination of shipping reports among manufacturers and affiliated warehouse companies. In manufacturing, vertical networks centering on big enterprises are

Continued on next page

EDI, Japan *. . . from page 3*

facilitating material flows. In banking, enhancing the Zengin interbank clearinghouse, major banks are forming new systems called "the third on-line system" which provide cash management, financial information, and news.

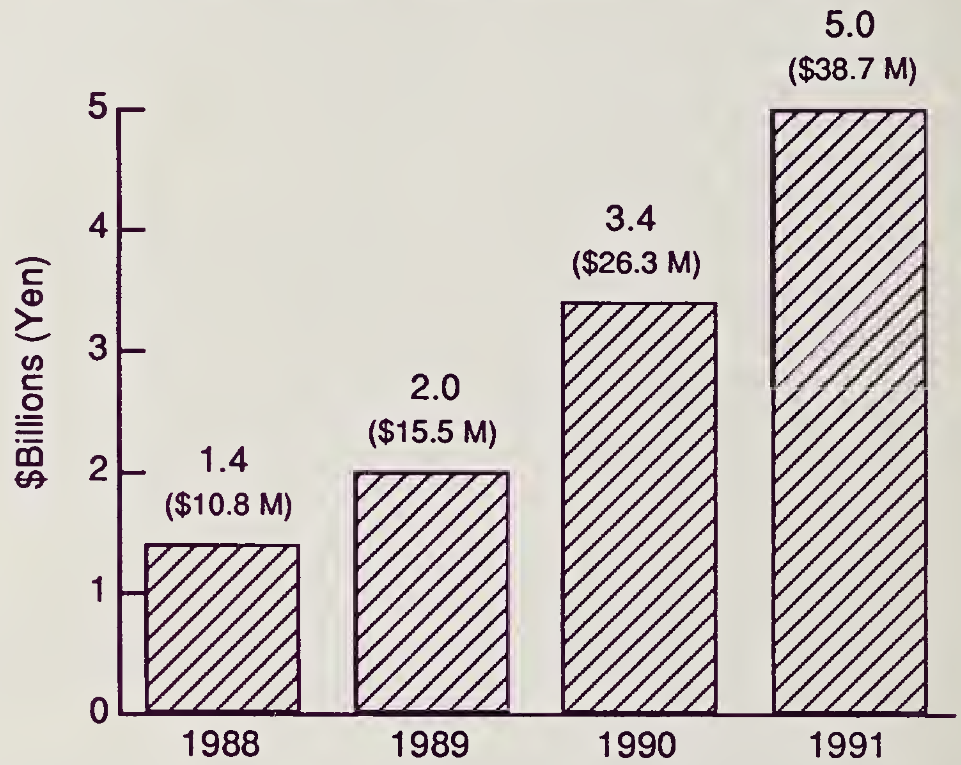
INPUT estimates that in the mid-eighties (1983-1986), nine percent of all Japanese companies had some form of intercompany networking. By 1988, this had reached 33%.

With the trend toward diversification of consumer tastes and the individualization of products and services, competition in Japan is reaching new levels of intensity. Companies are seeking ways to keep up with rapidly changing market environments, reduce inventories, and speed delivery times.

Information systems in Japanese industries have been developing steadily throughout the eighties, through inter- and intracompany networking. Recently, information processing has been expected to play a strategic role for enterprises that operate globally. This is a change from the previous understanding of information processing—that information processing was primarily for making business operations more efficient. For a few years now, many companies from various industries and businesses are moving from traditional paper-oriented operations to networked-based EDI. INPUT expects this trend to continue.

Exhibit 1

EDI Markets in Japan
(In U.S. Dollar Equivalents; 129 Yen = $1)



The Japanese EDI market is estimated to be approximately 2.0 billion yen for 1989, 3.4 billion yen for 1990, and 5.0 billion yen for 1991, as shown in Exhibit 1.

A full report of EDI in Japan can be obtained in INPUT's forthcoming *EDI Sourcebook.* ■

Fujitsu Builds EDI Network to Singapore

Fujitsu has entered into an agreement with Singapore Network Services, the operator of the EDI VAN, TradeNet, to establish a data communications link between Tokyo and Singapore. Fujitsu aims to provide services to Japanese companies that are expanding into Southeast Asia. Fujitsu's network is already interconnected with AT&T's Japanese VAN, JENS, and CompuServe.■

BT Tymnet Discontinues Proprietary Mailbox Switch

BT Tymnet has told its international licensees that it will no longer support its electronic mailbox software. The company said it "will shift its emphasis to the development of a CCITT 1988 X.400-compliant message switching capability within its global network."

According to **Rand Walker**, manager, EDI product management, BT Tymnet is shifting away from offering private E-mail services fully operated by BT, and moving to services based on X.400. He said that increasingly, corporate E-mail users prefer captive systems operated in-house. BT is therefore scaling down its private E-mail business and offering transport services and international connectivity using a standard interface (the 1988 version of X.400). Privately operated corporate E-mail networks need only to build a X.400 gateway into BT's network to make use of its international reach.

In a prepared statement, BT went on to say: "BT Tymnet views its role in the public messaging services market as providing a sophisticated communications service, involving the intelligent routing of messaging traffic under the international X.400 standard. BT Tymnet's shift in emphasis is designed to keep abreast of its customers needs, which have resulted from changes in technology. This technology includes the increasing number of LAN and PC-based message-handling services.

"BT Tymnet will continue to work with its software licensees throughout the world (in 14 countries) and to meet its obligations and responsibilities to this community. Moreover, BT Tymnet remains fully committed to its existing customers and resellers, to whom it will continue to provide messaging and information services.

"As part of its strategy, BT Tymnet will continue its aggressive pursuit of interconnection agreements with other public messaging vendors, gateways to LAN-based private systems, and the provision of the end-to-end information retrieval via the Tymnet Global Network."

Source: Rand Walker, Manager, EDI Product Management, BT Tymnet, San Jose, CA, 408-922-7812. ■

New Product for EDI System Testing

Recently formed **Foresight Corp.** (Dublin, OH) is developing software that allows operators of large EDI installations to test their systems (translation, communications, and applications software). Every time a change is made to the EDI system—a new trading partner or transaction set is added, for example—Foresight's software produces a data battery that is run through the system. Errors, performance variables, functional discrepancies, and other output are then identified. The idea is to conduct such testing before going live with trading partners. Keeping the testing of the system in-house is much less troublesome and costly than testing and working out problems with trading partners.

Called EDI Simulator, the product is available for beta testing now and will be generally available in January. It is licensed to a single mainframe CPU for $29,500. The price includes unlimited copies of a PC-based "script builder" software that allows users to develop data interchange scenarios. The product is aimed at large EDI users. Such users are continually changing their EDI systems, according to **Robert Fisher**, president of Foresight. EDI Simulator allows these users to grow their EDI capability in a controlled, quality-assured way. The frequency of use of EDI Simulator depends on the frequency of change to the system. As one interested Foresight customer said, "Change testing is a one-time activity that you do once a week."

Source: Robert Fisher, President, Foresight Corp., Dublin, OH, 614-766-6663. ■

GTE Health Systems and Sterling Software Link Hospitals and Suppliers

GTE Health Systems (Tampa, FL), a provider of health care software and processing services, has interconnected its computing service with Sterling Software's Ordernet (Columbus, OH). The connection will allow GTE's more than 200 client hospitals to order supplies from Ordernet's EDI client base of pharmaceutical, medical supply, and grocery vendors. GTE's Medseries4 software offers hospitals an integrated set of 40-50 applications (including accounting, materials management, patient care, etc.). The software ties into network and processing services also offered by GTE. Services include medical insurance claims filing service. With the tie into Ordernet, GTE is offering a new network service called Gateway*Express, which allows for the ordering of hospital supplies. GTE is pursuing interconnection agreements with three other health care supplier EDI clearinghouses, according to a company spokesman. The agreements will expand the base of suppliers from which GTE hospitals can order. The EDI service will help GTE sell its materials managment application software.

GTE Health Systems is part of **GTE Information Services** (Tampa, FL), which in turn is a wholly owned subsidiary of **GTE Corporation** (Stamford, CN). ■

FoodCom Offers Low-End EDI Translator; Looks beyond Grocery

Food-industry service provider FoodCom (Malvern, PA) now offers an EDI translation software product priced at $1,795. This is half the price of its full-function PC translation product, "FrEDI" (FoodCom Relational Electronic Data Interchange). The new, low-end product, "Fast FrEDI," is aimed at spoke companies that need a simple, easy-to-install EDI capability.

Fast FrEDI integrates with a user's application software through standard batch interfaces. The user maps data files through a menu-driven programming interface that is built into Fast FrEDI. Users can program Fast FrEDI to deliver or pick up batch files from applications automatically. Fast FrEDI is designed to work with the FoodCom network. FoodCom maintains and updates the software through the network. If the user company needs new transaction sets or new trading partners, for example, FoodCom will prepare the necessary transaction sets and lookup tables and store them in the user's FoodCom mailbox. The next time the user accesses its mailbox, it automatically downloads the tables and updates its software.

FoodCom is selling an annual maintenance contract with Fast FrEDI for $895.

According to Sri Sridharan, president of FoodCom, the software is initially targeted for spoke companies in the food manufacturing and distribution sectors. Spoke companies in these sectors come in a variety of classifications: some are the groups of small manufacturers who supply large retailers, and some are the customers of large manufacturers. Brokers, agents, and distributors are spokes for everyone, according to Mr. Sridharan. "The pressure for (a fast EDI capability) is not just in one segment; it comes from top and bottom," he said.

Mr. Sridharan indicated that although FoodCom is focused exclusively on the grocery industry now (and has over 500 customers), it is looking into other industries where it can offer EDI software and services. "We will expand into other areas shortly," he said.

FoodCom is a business partner of IBM and uses the IBM Information Network as the direct-dial communication service it resells to its customers. FoodCom's other primary applications support order management, and the company offers value-added services such as commodities data bases and food industry news. It also

offers professional services to help firms implement EDI and take advantage of the technologies available.

With its Fast FrEDI, FoodCom is pursuing a strategy that other EDI service providers and VANs have taken—namely, IBM's QuickEDI service (see April 1990 EDI Reporter) and Sears' turnkey EDI service (August 1990 EDI Reporter). IBM's QuickEDI PC software costs the same as FoodCom's—$1,795. Sears is offering its software to Sears suppliers free. Beginning in 1991, it plans to sell it to all of its network customers. Like FoodCom, Sears updates its software through the Sears network—if the user is a network subscriber.

Source: Sri Sridharan, President, FoodCom, Inc., Malvern, PA, 215-644-1231. ■

News Bits

GEIS and **IBM IN** have established an X.400 interconnect to exchange E-mail messages between the two networks.

Kenji Itoh, executive director of the **Japanese Association for the Simplification of Trade Procedures**, is the rapporteur to EDIFACT from Japan and Singapore. **Harvey Bates** is the rapporteur for Australia and New Zealand.

Sterling Software has created EDI Group, which is composed of its existing Ordernet Services Division and two newly formed divisions, the EDI Labs Division and the EDI International Division. **Warner Blow** has been named EDI Group president, while continuing to serve as executive vice president of Sterling Software and president of the applications software group.

Klaus-Dieter Naujok joined midrange translator maker **ACS/Premenos** (Concord, CA) as manager of EDI standards representation. Mr. Naujok is one of the most actively involved people in EDI standards design and is currently Vice Chairman of the North American EDIFACT Board, UN Vice Rapporteur for EDIFACT, Chairman of the Standards Council of Canada Joint Technical Committee on EDI, Chairman of ANSI ASC X12 J/Task Group 6 (Technical Assessment), among other positions. He is author of the book *EDI Standards: Making Them Work in Software.*

Calendar

December 3-5, Washington, D.C., 22nd TDCC/EDIA Conference, TDCC/EDIA, 703-838-8042.

*December 10-11, Le Parker Meridien Hotel, New York, NY, The Global Networking Conference, Telecommunications Reports, 202-347-2970.

*December 10-13, Sheraton El Conquistador, Tucson, AZ, Telecommunications Industry Forum EDI Committee Meetings, Symbol MSI and Condux International, 301-564-5165.

*January 28-31, 1991, Washington, DC, Ramada Renaissance Techworld, Communication Networks 91, World Expo Corporation, 617-965-8000.

*February 4-8, 1991, Hyatt Regency Embarcadero, San Francisco, CA, ASC X12 Trimester Meeting, Data Interchange Standards Association, 703-548-7005.

March 10-13, 1991, San Francisco Marriott, 1991 NACHA Conference, NACHA, 703-742-9190

*March 10-15, 1991, Doral Resort and Country Club, Miami, FL, National Customs Brokers and Forwarders Association of America, Inc. Annual Convention, NCBFAA, 212-432-0050.

*April 7-10, 1991, Palmer House, Chicago, IL, Corporate EFT/Financial EDI Conference, University of North Carolina, Chapel Hill, Business School, 919-962-9630.

April 24-26, 1991, Marriott's Orlando World Center, Orlando, FL, X12/DISA EDI '91, 703-548-7005

*May 15-17, 1991, Jolly Hotel, Milan, Italy, ELEDIS '91, XCOMS International, 39-2-952-2102.

*June 3-7, 1991, Innisbrook Resort, Tampa, FL, ASC X12 Trimester Meeting, Data Interchange Standards Association, 703-548-7005.

*June 18-19, 1991, Mayflower Hotel, Washington, DC, 10th Annual International Trade and Computerization Conference, NCITD, 212-925-1400.

*September 30-October 4, 1991, ASC X12 Trimester Meeting, (site to be announced), Data Interchange Standards Association, 703-548-7005.

*December 11-13, 1991, San Diego, CA, 23rd EDI Systems Conference, EDIA, 703-838-8042. ■

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
Atrium at Glenpointe
400 Frank W. Burr Boulevard
Teaneck, NJ 07666
Tel. (201) 801-0050
Fax (201) 801-0441

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT
EDI
Reporter
International

Issued monthly by INPUT's EDI program

Publisher: INPUT
Editor: Torrey Byles
EDI/Banking: Norman G. Litell
EDI/Federal: James Kerrigan
International Networking: Alex Graham
Graphics: Andrea Jeris, Calvin Wade, Lynette Nguyen, Cheryl Tompkins

The ***EDI Reporter International*** is published each month by INPUT and is available for $350.00 per year/per subscriber (Outside North America - $375 per year). To subscribe, or for more information about INPUT's Electronic Data Interchange reports, conferences, and continuing "Hotline" support, contact any INPUT office.

...INPUT Analyzes EDI's Tactical and Strategic Impacts in the Real World!

Information on how EDI is really being used out there in the real world would be of tremendous value to users who want to avoid reinventing the wheel, and to vendors who want to refine their development and marketing efforts. Yet this information has been almost impossible to get.

Until now. INPUT has just released its new report on *EDI: Business Integration Issues*, a comprehensive and detailed analysis of the impacts of electronic data interchange on companies in every major industry.

This is not macroeconomic theory. This is case-study analysis designed to ferret out the competitive advantages and disadvantages of EDI when companies—your competitors, clients, and suppliers—actually take the plunge.

EDI: Business Integration Issues
The Organizational Impact of EDI
• The Tactical Impact of EDI • The Strategic Impact of EDI • Systemic Knowledge, EDI and Integration
Tying EDI to Business Operations and Strategy: Standards and Accounting
• Assessing When and Where EDI is Appropriate • The Importance of Standards • Problems and Issues with Today's EDI Standards • Activity-Based Accounting and EDI
EDI Integration Tools and Allied Information Technologies
• EDI Software Products • Messaging Systems and Environments • Automatic Identification • Data Capture
Conclusions & Recommendations

The report is based on ongoing primary research into one of the most complex and fast-moving technologies in existence. Interviews with vendors, with users, with standards-making bodies, with the people forging this new technology and its place in business today form the framework of the report. But the analysis by INPUT's EDI experts gives you an additional value-added interpretation that is available nowhere else.

And if you act before November 19, 1990, you'll pay $200 less than the regular list price for the report—a savings of 10 percent!

EDI: Business Integration Issues is the only source of reliable and comprehensive information on the day-to-day integration questions that can have such a tremendous impact on how successful EDI is in normal business environments.

Not Just Information

But it's not just information. INPUT's report is designed to put the tactical and strategic impacts of EDI into perspective, to allow users and vendors to answer the questions that bear on competitive advantage in their own markets:

- How does EDI change workflows and job descriptions? The report analyzes how buyers at Digital Equipment Corp. have become liaisons between customers and design engineers.
- How does EDI change accounting practices? The report investigates: the merger of ship notice and invoice for SuperValu, a large food retailer; the elimination of reconciliation disputes in the oil industry using an EDI package called Petroex; the switch from credit to debit mechanisms initiated by R.J. Reynolds Tobacco; and others.
- How does EDI enable companies to offer new products and services? The report details: th transformation of Merit Steamship Agency Inc., a mid-size shipping company, from agent

ORDER FORM

YES! I want to know more about integrating EDI in real-world business situations. I need INPUT's report *EDI: Business Integration Issues.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, ***EDI: Business Integration Issues*** at the fee of $1,995 each.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ____________ to cover the cost of my order.

☐ Charge $____________ to my American Express card:

Card # ______________________________

Exp. date ____________

Name as it appears on my card ______________________________

Signature ______________________________

☐ Bill my company for $ ____________ on purchase order number ____________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

EDIII 10/90

CONDITIONS AGREEMENT

INPUT

to electronic information supplier thanks to EDI; the evolution of customs broker Penson and Co. into a supplier of on-line information on freight moving through customs; the expansion of Sears Roebuck's product line to include EDI software and services; and more.

- How does EDI change the structure of organizations? The report describes: the development of closer relationships between suppliers and their customers, including the pioneering efforts of Levi Strauss and Playtex; the merger of sellers' accounts receivable with buyers' accounts payable at General Electric Information Services Co.; the centralization of purchasing operations at Hewlett-Packard and Mervyn's.

And other impacts such as the role of EDI in mergers and acquisitions, coordinating manufacturing activities, and business expansion.

EDI Is Best Suited for Repetitive Commercial Exchange of Well-Defined Products

product-feature ambiguity	low commercial exchange recurrence	high commercial exchange recurrence
high	- large professional service projects (construction...) - big ticket items (IBM 3090...)	- fashion apparel
low	- once-a-year expenditures	- office supplies - non-fashion apparel - grocery products - replacement parts - transport documentation

An Advantage in EDI

These case studies make up a large proportion of the report. But *EDI: Business Integration Issues* also addresses larger issues that place these company-specific developments in perspective:

- How is EDI restructuring value chains?
- How is it conferring competitive advantage in various industries?
- How do you assess when and where EDI is appropriate?
- How do you assess its effects on all departments?
- What are the potential impacts of new business strategies on EDI standards?
- How will developments in EDI data mappers, bar code technologies, data bases, and natural language processing affect EDI?

Plus a thoughtful section on recommendations for EDI users and vendors, and a look into the technological and organizational future of electronic data interchange.

EDI is here to stay, and its impacts will extend far beyond esoteric changes in accounting and purchasing practices. With changes of this magnitude happening this fast, there will be tremendous opportunities for competitive advantage *if you have the right information.*

And giving you the right information is what INPUT's EDI integration report is designed to do.

Do you want that advantage? Then fill out the enclosed order form and drop it in the mail today.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT Offices

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

If You Need To Know How To Turn New Developments in EDI To Your Advantage...

- How is EDI being applied?
- What are users' concerns?
- How big is the market now and through 1995?
- Who are the leading EDI vendors?
- What sets their products and services apart?

... INPUT Shows You Where the EDI Opportunities Are!

The potential is that Electronic Data Interchange (EDI) could revolutionize every aspect of the way companies do business with each other.

But what exactly is happening in the EDI markets today and for the next five years? How fast will they grow? What forces are at work accelerating that growth? Slowing it down? How will they affect *your* company?

If you are an EDI vendor or user, the answers to these kinds of questions could have a dramatic impact on how you structure your own plans for growth over the next five years.

INPUT has published a new report entitled *The EDI Market, 1990-1995,* that is designed from the ground up to answer these questions.

The Electronic Data Interchange Market, 1990-1995
Background on EDI
EDI Input-Output Analysis
• Definition and Relevance • EDI Input-Output Matrix • Implications of Input-Output analysis
Market Size and Forecast
EDI Market Trends
• Software Products • Network Services • Professional Service Trends
EDI Trading Communities and Applications
• Automobile Manufacturing • Paper, Printing, and Publishing Industries • Retail, Apparel, and Textile Industries • Etc.
Conclusions and Recommendations

And if you act before November 19, 1990, and buy just this report, you'll pay $300 less than the regular list price for the report—a savings of 10 percent on targeted market intelligence that could change the way you do business!

INPUT is also publishing a report that complements this report's total-market focus. Entitled *EDI: Business Integration Issues,* this second report focuses on the practical questions of how individual businesses have solved the problems of EDI integration in the real world.

And if you buy that report too, you can save an additional 10 percent off the total price for the two reports.
A 20 percent savings for the complete picture!

EDI could transform companies' relationships with large vendors, with large customers, with banks, insurance companies, and firms at every level of the product development, manufacturing, and distribution chain. And that will create tremendous opportunities for people with the right information.

A Unique Analytical Tool

INPUT's report gives you that information. The result of more than a man-year of primary research into every aspect of electronic data interchange, *The EDI Market, 1990-1995* gives EDI marketers and users unique insights into where this rapidly changing technology is headed *and why*. The report tells you:

- How big the market for EDI network services, software, and professional services is now, and how fast it will grow over the next five years.
- Who the leading EDI vendors are, and why their products and services have been embraced by the marketplace.
- Where the new market and product opportunities will be.
- What the dominant user trends are in EDI adoption, including what users say their reasons for implementation are, what kind of platforms they are using, how they are reconciling parallel paper and electronic systems, and more.

ORDER FORM

YES! I need to know everything I can about one of the most revolutionary technologies out there today. I need INPUT's report *The EDI Market, 1990-1995*.

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, *The EDI Market, 1990-1995* at the fee of $2,995 each.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:
Card # ______________________________
Exp. date ____________
Name as it appears on my card ______________________________
Signature ______________________________

☐ Bill my company for $ ______________ on purchase order number ____________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

EDI90 10/90

CONDITIONS AGREEMENT

ies

INPUT

The report also introduces a unique analytical tool called the EDI Input-Output Matrix. Using this matrix, vendors and users can focus on the issues that will have the greatest impact on their operations and overall profitability, clearly analyze the costs and benefits, and come to a rational conclusion regarding where EDI can give them a competitive advantage.

Creating Competitive Advantage

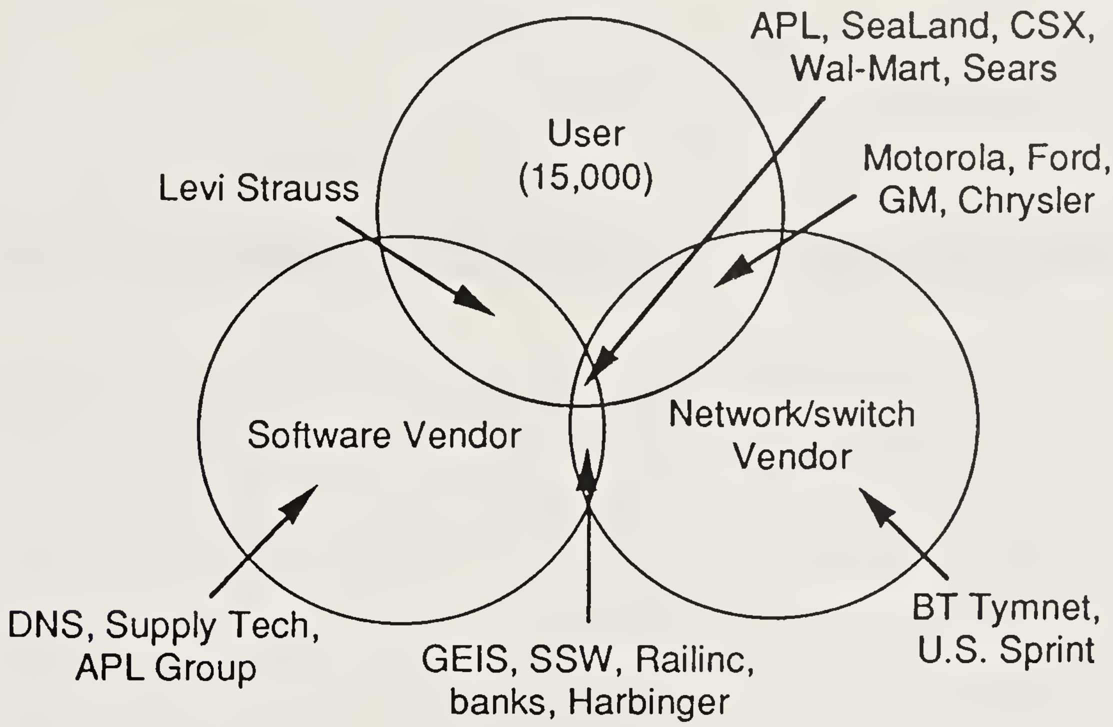
The report does not stop with these issues. *The EDI Market, 1990-1995* is a compendium of research that touches literally every significant aspect of this revolutionary technology:

- What impacts can be anticipated from EDI server architectures?
- What role will value-added networks play in the future?
- How will the "Hub-and Spoke" phenomenon affect users' choices and vendors' product offerings?
- Where is the three-tiered market for message-switching software headed?
- How will market consolidation affect providers of network services?
- Where are the opportunities in education and training?
- What are the major industries adopting EDI?
- How are their demands pushing development of real-time EDI and other advanced services?

Plus detailed case studies of institutions that have adopted EDI, analysis of future market and technical directions, and a set of in-depth recommendations for the major EDI constituencies (users and vendors).

Companies that want to take advantage of developments in EDI need the best market intelligence available. They need detailed analysis based on new primary research into every major facet of this potentially revolutionary technology.

Players in the EDI Market Wear Many Hats



EDI SERVICES AND SOFTWARE are provided by third party vendors as well as large hub users as shown in this exhibit from *The EDI Market, 1990-1995.*

That is what INPUT's *The EDI Market, 1990-1995* gives you. It gives you the best data and analysis available.

It gives you a tool for building competitive advantage.

Use the enclosed order form to order your copy today and save 10 percent off the regular purchase price. Or buy the companion volume on *EDI: Business Integration Issues* too, and save 20 percent.

Do it now. Reliable information is the key to your success.

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

Electronic Data Interchange Program (EDIP) 1990 Program

Market/Issue Reports	Profiles	Client Support
EDI Intertrends 1989-1994 (market analysis report)	Service Provider Profiles	"Hotline" Inquiry Service
Two Issue Reports (preliminary topics): - Competitive Advantage and EDI - Financial Services and EDI - Data Administration and EDI	Software Provider Profiles	Access to INPUT Information Centers
	Professional Services Provider Profiles	*EDI Reporter International* Monthly Newsletter
	International EDI Survey Country Profiles (expands upon 1989 Standards Reference Manual)	On-Site Presentation (optional; additional fee)
		INPUT Annual Executive Conference (optional; reduced fee)

INPUT's 1990
Electronic Data Interchange Program

Yes!
Please enter my order as described:

Subscription to INPUT's Electronic Data Interchange Program (EDIP) at the fee of $13,500.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning ____________. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

- ❑ Enclosed is my check in the amount of $________________.
- ❑ Bill my company on purchase order number _____________ in the amount of $________________.

Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

Organization ____________________

Name ____________________

Title ____________________

Address ____________________

____

Telephone ____________________

Signature ____________________ Date

Accepted By INPUT:

Signature ____________________

Name ____________________

Title ____________________

Date ____________________

1288S-EDIP 1/90

INPUT®

If You Need To Know How To Turn New Developments in EDI To Your Advantage...

- How is EDI being applied?
- What are users' concerns?
- How big is the market now and through 1995?
- Who are the leading EDI vendors?
- What sets their products and services apart?

... INPUT Shows You Where the EDI Opportunities Are!

The potential is that Electronic Data Interchange (EDI) could revolutionize every aspect of the way companies do business with each other.

But what exactly is happening in the EDI markets today and for the next five years? How fast will they grow? What forces are at work accelerating that growth? Slowing it down? How will they affect *your* company?

If you are an EDI vendor or user, the answers to these kinds of questions could have a dramatic impact on how you structure your own plans for growth over the next five years.

INPUT has published a new report entitled *The EDI Market, 1990-1995,* that is designed from the ground up to answer these questions.

The Electronic Data Interchange Market, 1990-1995
Background on EDI
EDI Input-Output Analysis
• Definition and Relevance • EDI Input-Output Matrix • Implications of Input-Output analysis
Market Size and Forecast
EDI Market Trends
• Software Products • Network Services • Professional Service Trends
EDI Trading Communities and Applications
• Automobile Manufacturing • Paper, Printing, and Publishing Industries • Retail, Apparel, and Textile Industries • Etc.
Conclusions and Recommendations

And if you act before November 19, 1990, and buy just this report, you'll pay $300 less than the regular list price for the report—a savings of 10 percent on targeted market intelligence that could change the way you do business!

INPUT is also publishing a report that complements this report's total-market focus. Entitled *EDI: Business Integration Issues,* this second report focuses on the practical questions of how individual businesses have solved the problems of EDI integration in the real world.

And if you buy that report too, you can save an additional 10 percent off the total price for the two reports.
A 20 percent savings for the complete picture!

EDI could transform companies' relationships with large vendors, with large customers, with banks, insurance companies, and firms at every level of the product development, manufacturing, and distribution chain. And that will create tremendous opportunities for people with the right information.

A Unique Analytical Tool

INPUT's report gives you that information. The result of more than a man-year of primary research into every aspect of electronic data interchange, *The EDI Market, 1990-1995* gives EDI marketers and users unique insights into where this rapidly changing technology is headed *and why*. The report tells you:

- How big the market for EDI network services, software, and professional services is now, and how fast it will grow over the next five years.
- Who the leading EDI vendors are, and why their products and services have been embraced by the marketplace.
- Where the new market and product opportunities will be.
- What the dominant user trends are in EDI adoption, including what users say their reasons for implementation are, what kind of platforms they are using, how they are reconciling parallel paper and electronic systems, and more.

ORDER FORM

YES! I need to know everything I can about one of the most revolutionary technologies out there today. I need INPUT's report *The EDI Market, 1990-1995.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, *The EDI Market, 1990-1995* at the fee of $2,995 each.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:

Card # ______________________________

Exp. date ____________

Name as it appears on my card ______________________________

Signature ______________________________

☐ Bill my company for $ ______________ on purchase order number

____________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

EDI90 10/90

CONDITIONS AGREEMENT

The report also introduces a unique analytical tool called the EDI Input-Output Matrix. Using this matrix, vendors and users can focus on the issues that will have the greatest impact on their operations and overall profitability, clearly analyze the costs and benefits, and come to a rational conclusion regarding where EDI can give them a competitive advantage.

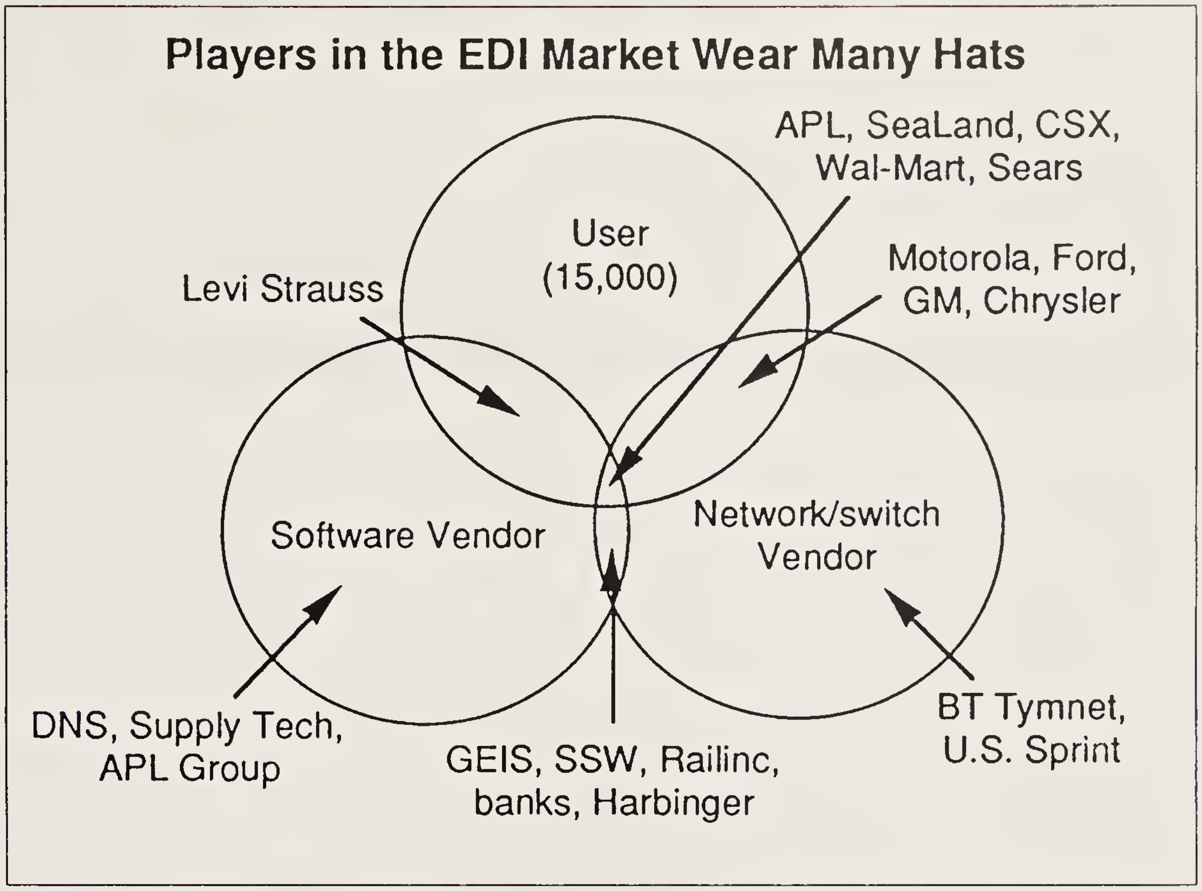
Creating Competitive Advantage

The report does not stop with these issues. *The EDI Market, 1990-1995* is a compendium of research that touches literally every significant aspect of this revolutionary technology:

- What impacts can be anticipated from EDI server architectures?
- What role will value-added networks play in the future?
- How will the "Hub-and Spoke" phenomenon affect users' choices and vendors' product offerings?
- Where is the three-tiered market for message-switching software headed?
- How will market consolidation affect providers of network services?
- Where are the opportunities in education and training?
- What are the major industries adopting EDI?
- How are their demands pushing development of real-time EDI and other advanced services?

Plus detailed case studies of institutions that have adopted EDI, analysis of future market and technical directions, and a set of in-depth recommendations for the major EDI constituencies (users and vendors).

Companies that want to take advantage of developments in EDI need the best market intelligence available. They need detailed analysis based on new primary research into every major facet of this potentially revolutionary technology.



EDI SERVICES AND SOFTWARE are provided by third party vendors as well as large hub users as shown in this exhibit from *The EDI Market, 1990-1995*.

That is what INPUT's *The EDI Market, 1990-1995* gives you. It gives you the best data and analysis available.

It gives you a tool for building competitive advantage.

Use the enclosed order form to order your copy today and save 10 percent off the regular purchase price. Or buy the companion volume on *EDI: Business Integration Issues* too, and save 20 percent.

Do it now. Reliable information is the key to your success.

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

Find out where the real opportunities exist in the Federal EDI market

U.S. EDI Federal Markets, 1989–1994

- UNDERSTAND the commercial factors driving federal EDI
- POSITION your company's marketing and product offerings according to agency needs and product selection criteria
- TARGET the product categories that represent high growth in this market
- DEVELOP the sales and pricing strategies needed in marketing to the government
- IDENTIFY competitors and potential teaming partners

You will find:

- Market forecasts through 1994
- Defense and civil agency requirements and trends
- Competitive analysis and profiles
- Strategies and market opportunities

Call, mail, or fax your order to INPUT
at any office listed on the back of this brochure

Play a role in the Federal Government's

The federal government, in its efforts to improve productivity through information technology, is adopting EDI in a big way. By a government-wide mandate, the federal government is requiring electronic linkage with private sector companies and other government agencies. The federal government provides lucrative opportunities to vendors of EDI products and services—if they understand the unique characteristics, requirements, and purchasing procedures of the federal sector.

The *U.S. EDI Federal Market, 1989–1994* report gives you vital information you need to understand and plan for EDI opportunities in the federal government. This report is a complete analysis of this major force in the EDI market and addresses all the major issues confronting the market.

U.S. EDI Federal Market
• Market Analysis and Forecast • Federal Agency Requirements and Trends • Competitive Trends • Key Opportunities
Agency Perspectives
• Functional Requirements • Performance Criteria • Laws, Policies, Regulations • Acquisition Plans and Preferences • Vendor Performance
Vendor Perspectives
• Vendor Participation • Market Issues • Vendor Selection and Performance • Teaming Patterns

WHAT ARE THE PRESSURES IN THE FEDERAL EDI MARKET?

Understanding the commercial and budgetary pressures that are increasing EDI implementation in government agencies is vital to developing growth strategies in this market. Commercial expectations, agency staffing inadequacies, and the government's reliance on information technology are discussed in terms of their impact on the federal EDI market. Industry concerns, such as security, legal issues, and budgetary constraints, are also analyzed.

HOW DO WE MARKET EDI PRODUCTS AND SERVICES TO THE FEDERAL GOVERNMENT?

Effective marketing to the government requires a thorough knowledge of federal EDI applicati and priorities and the unique procurement mechanisms in government agencies. This report explores the specific EDI applications important to government agencies, product requirements, and unmet needs.

In addition, the report reviews the sales issues unique to the federal market, including procurement policies and preferences, vendor selection criteria, and existing contracts and programs.

WHERE DO MARKET OPPORTUNITIES EXIST IN THE FEDERAL MARKET?

This report forecasts market size and growth rates across the major delivery modes comprising the EDI market in order to provide you with flexible assessments of market opportunity. Each forecast is based on stated assumptions and analysis of major trends in the market. By providing accurate and substantiated market forecasts, this INPUT report is the starting point for your successful market and strategic plans.

INPUT®

1953 Gallows Road, Suite 560, Vienna VA 22182
(703) 847-6870 Fax (703) 847-6872

Gain Insight into the Federal Government's Use and Development of EDI

The federal government will be a major force in the implementation of EDI in the U.S. in order to improve productivity and overcome staffing inadequacies at agencies. INPUT's forecast for the next five years calls for the federal EDI market to continue its growth despite budget restrictions and regulatory conditions impacting the federal marketplace.

The newly updated report on the U.S. EDI Federal Markets, 1989-1994 focuses on the current responses of the federal agency and vendor communities to issues, trends, and changing needs of this market. It also analyzes the government's direct role in implementing EDI with its 500,000 suppliers and its continual influence through standards and regulations.

To receive your copy of this informative report, please mail or fax the enclosed order form, or call INPUT at (703) 847-6870 or (415) 961-3300.

Best regards,

John E. Frank

John E. Frank
President, INPUT Inc.

A NEW REPORT FROM INPUT

Gain insight into the federal government's use and development of EDI...

Call, Mail or Fax Your Order Today

Order Form INPUT's Research Studies

Yes!
Please enter my order as described:

U.S. EDI Federal Markets, 1989-1994 report at the fee of $1,500

Take off $75 if check included with order!

TERMS OF PAYMENT
Payment in full is due within 30 days of invoice date.

- ❑ Enclosed is my check in the amount of $________________.
- ❑ Bill my company on purchase order number ______________ in the amount of $________________.
- ❑ Charge $______________ to my American Express #____________________.
  Exp. date ________________ Signature ______________________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

CONDITIONS AGREEMENT
The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1953 Gallows Road
Suite 560
Vienna, VA
22182
(703) 847-6870
Fax (703) 847-6872

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

Accepted By INPUT:

Signature

Name

Title

Date

GEDI 1/90-dm

INPUT

growing implementation of EDI

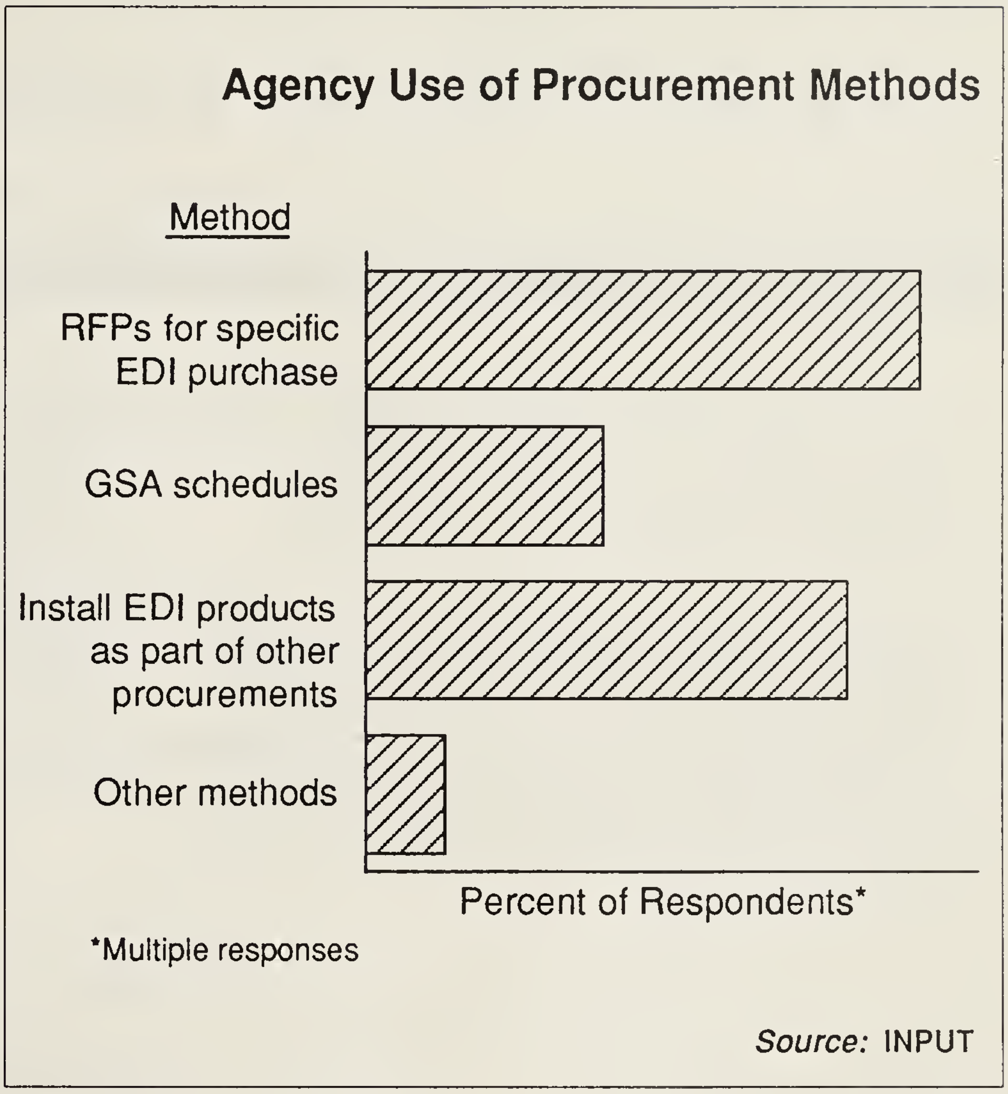
FEATURES AND BENEFITS OF THIS REPORT

U.S. EDI Federal Markets is based on research of agency long-range plans for EDI programs and new system installations. Federal agency officials and EDI vendor executives were interviewed to obtain information on agency plans and product development strategies.

As a comprehensive analysis of the important competitive factors and considerations in the federal EDI market, this report is an indispensable planning tool to marketing and operations executives and managers who plan to take advantage of this growing opportunity.

The *U.S. EDI Federal Market* report is one of a series of federal market analysis reports. Other reports in the program include:

- *Federal Microcomputer Market, 1989-1994*
- *Federal Software and Related Services Market, 1989-1994*
- *Federal Systems Integration Market, 1989-1994*
- *Defense Logistics Agency Information Services Market*
- *Federal Processing Services/Systems Operations Market, 1989-1994*
- *Federal Professional Services Market, 1989-1994*



About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

EDI Essentials for the 1990s: *Your Total EDI Resource*

EDI Intertrends—North America

IS Managers, Marketing & Marketing Support Managers, and CEOs:

- CREATE YOUR OWN EDI TRAINING AND MARKETING MATERIALS for customers and internal use with *The EDI Tutorial*
- UNDERSTAND the ANSI/EDIFACT standards controversy and how it affects your operation
- MAKE THE RIGHT CHOICES by evaluating competitive EDI products, networks, professional and consulting services
- DESIGN YOUR OWN EDI PROGRAM with INPUT's case study analyses of real-world EDI implementations

EDI Network, Software, and Hardware Vendors

- COMPETE successfully by assessing your competitors' programs and international marketing strategies
- FORECAST your market's potential efficiently with intelligence on total market size, market share, and the competition's customer-based sales volumes.
- INCREASE your market share with an insider's look at users' purchasing plans, level of vendor satisfaction, and EDI implementation strategies.
- GET INSIDE INFORMATION on competitors' new products, price schedules and services, mergers, acquisitions and personnel changes

AT & T, British Telecom/ McDonnell Douglas, Control Data, Federal EDI Network Services, Foodcom GE Information Services Harbinger, Kleinschmidt Computer, Sears Communications Company Sterling Software Ordernet EDI Inc., IBM, MSA, TranSettlements, Unisys... and more are profiled in this report.

The EDI ESSENTIALS for Success in the

" The expected, but not materialized, RBOC (Regional Bell Operating Companies) market entry and the lack of market development activities by second-tier players has allowed leading vendors to achieve high growth rates while others have been left far behind. "

-from INPUT's *EDI Intertrends*

The global economy is here to stay. INPUT's EDI Intertrends gives you the data you need—clearly, concisely, graphically—to understand the complex interrelationships in today's and tomorrow's EDI world. These Intertrends include:

INTERnational Trends—developments and implementation in Europe, Asia, and North America

EDI Intertrends—North America

An Electronic Data Interchange Tutorial

- Background, Functions, Varieties and Relationships
- Software Solutions
- Relationship between:
  - Electronic Mail (E-Mail) and EDI
  - EDI and On-Line Order Entry Systems
  - EDI and Electronic Funds Transfer
  - EDI and Logistics
  - EDI, Data Bases and Internal Applications
  - EDI, JIT and MRP

User EDI Intertrends

- User Networking Dynamics
- Computer Equipment Used
- Implementation Reasons
- New Industry Implementations

EDI Network Service Intertrends

- Customer Satisfaction
- Pricing and Profitability Intertrends
- EDI Network Service Developments
- Regional Bell Operating Companies and Community EDI Systems
- Network Internationalization

EDI Software Intertrends

- Research Findings
- EDI Software Company Developments

EDI Professional Service Intertrends

- User Survey Findings
- Professional Services Industry Structure
- EDI Professional Services Market Structure
- EDI Professional Services Segment Activities
- EDI Professional Services Market Segmentation

EDI Market Forecast Intertrends

- Network Services Forecast Factors
- EDI Network Service Forecast
- EDI Network Services Market Shares
- EDI Software Markets
- Professional Service Forecast
- Computer Equipment and Peripherals for EDI—Not Forecast
- The Federal EDI Market
- EDI-Driven User Expenditures
- Total EDI Market Forecast
- Forecast Reconciliation
- Acquisition Intertrends

Opportunities and Conclusions

·990s

Standards INTERfusion—the merging of disparate standards (ANSI, EDIFACT, UCS, TDCC, Tradacoms, etc.) into a single, worldwide EDI standard

"INTERgration"—of EDI systems with other data processing systems

INTERnetworking —EDI data networks linking together

" Aggregated EDI market growth for EDI services, software, and professional services, represent a nearly 40% compound annual growth rate through 1994. "

-from INPUT's *EDI Intertrends*

BE PREPARED FOR EDI OPPORTUNITIES

EDI Intertrends offers much more than discussion of current trends and issues. This essential report gives recommendations, opportunities, and conclusions to both vendors and users, based on in-depth market survey research and intelligence. Find out what kinds of companies implement or fail to implement EDI. Why? If not, why not? Vendors can validate their marketing strategies to gain entry and market share in the expanding EDI markets, and prepare to defend markets that are being challenged. The report tells you where the market is expanding and where time is running out for new entrants.

IS Managers, Marketing Managers, and CEOs can maximize the benefits of their EDI operation and minimize potential pitfalls such as limited integration, legal issues, and cost concerns by learning from other EDI applications and user implementations.

" EDI transactions are one-tenth the equivalent paper document costs. "

-from INPUT's *EDI Intertrends*

YOUR BASIC EDI MARKETING BUILDING BLOCKS

INPUT's EDI Tutorial gives you the basic building blocks to create your own EDI marketing materials. Whether you are introducing EDI internally, implementing EDI at customer installations, or selling EDI software, hardware, or consulting services, you have all the information you need to explain EDI and communicate the benefits.

YOUR ONE-STOP EDI REFERENCE GUIDE

INPUT's EDI Intertrends is the *EDI Almanac* for the 1990s, combining valuable strategic information with encyclopedic coverage of the EDI world for both vendors and users. This report clearly explains and analyzes the history and development of EDI, the dangers and opportunities inherent in the standards controversy, the relationships between EDI applications and other data interchanges, and other major issues in the EDI world. INPUT's *EDI Intertrends* report is an invaluable one-stop reference guide for any participant in EDI, whether new to the field or an EDI veteran.

The *Must Have* EDI Report for the 1990s

Call, mail, or fax your order to INPUT

at any office listed on the back of this brochure

AVAILABLE DECEMBER 1989

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

EDI Strategies for Success: Opportunities for Growth and Profits in the 1990s

EDI Advanced Services

EDI Users:

- REVIEW today's installations of advanced EDI services such as transaction data bases, CAD/CAM file transfers, and inventory modeling from POS data
- LOOK INTO THE FUTURE to the coming possibilities of EDI, such as natural language translation
- SHOP INTELLIGENTLY by knowing the issues and the vendors of advanced EDI services
- LEVERAGE your company's existing EDI program

EDI Network, Software, and Professional Service Vendors

- IDENTIFY NEW MARKET OPPORTUNITIES in EDI
- MAXIMIZE your R & D customer support strategy by addressing users' real concerns and requirements (based on INPUT's EDI user surveys and case histories from the users' perspective)
- FORECAST your market's potential with INPUT's competitive analysis —where the Advanced EDI Services market is expanding and where time is running out

Companies Profiled:

General Electric Information Services Sterling Software / Ordernet, Quick Response Services, Chase Manhattan, Wells Fargo, R.J. Reynolds Tobacco USA Inc., General Motors, The Internal Revenue Service ...and more

New EDI Opportunities for Maximized

“The most lucrative opportunities for vendors to the EDI market are through providing value-added or ‘advanced’ services.”

from INPUT's *EDI Advanced Services*

EDI Advanced Services
Market Size and Forecasts
• Advanced EDI Services Are Growth Frontiers • Advanced EDI Services Are the Fastest Growing Market Segment in EDI • Forecasts for Advanced EDI Services • Forecasts for Specific Services
Issues and Trends
• Relationship between EDI and EFT • Corporate Users of EDI/EFT • Bank Providers of EDI/EFT Services • On-Line Data Bases and EDI • Transaction Data Base Issues and Opportunities • Graphics, Nonuniform Data and EDI • Internetworking Services • User Concerns • Data Capture and Analysis Services • Network Vendor Concerns • Implications of Interactive EDI • The Future of Advanced EDI Services • Bank Industry EDI/EFT Strategies

New EDI applications are going beyond mainstream uses such as purchasing and logistics. The market for value-added "advanced" EDI services is growing at an annual rate of 80%! These new applications and services, pioneered by innovative vendors and users, include:

- Integration of funds transfer mechanisms with EDI
- Exchange of graphics files with EDI standard messages
- On-line data bases in conjunction with EDI
- Interactive EDI
- Satellite-based transmission techniques
- Interconnection of third-party networks and international services for EDI
- Conversion services between EDI and other communications media
- Processing of EDI data to produce other kinds of data and information.

“By 1994, one-fifth of user expenditures for EDI services will be devoted to advanced services—services offering the highest profit margins to vendors and the greatest value-added services to users.”

from INPUT's *EDI Advanced Services*

INPUT®

1280 Villa Street, Mountain View, CA 94041
415-961-3300 Fax 415-961-3966

The Most Lucrative Market Opportunity for the 1990s

If you've been wondering when someone was going to provide factual, no-nonsense market data on advanced EDI services, the answer is: Today.

INPUT has just released the most comprehensive and up-to-date report available on this market, *EDI Advanced Services*. In it, INPUT analyzes in detail the market's fantastic growth (a compound annual rate of 80%), a breakdown of user expenditures within the market, and the applications of EDI services that offer vendors the greatest profit potential.

The report is based on in-depth vendor case studies, user surveys, vendor surveys, product analyses, and ongoing firsthand contacts with leaders in the field.

The best way to exploit this opportunity is to disregard the glittering generalities you hear everywhere about EDI services, and concentrate instead on hard, fundamental market data.

INPUT's report helps you do that. Order it today.

Yours sincerely,

Denny Wayson

Denny Wayson
Vice President

A NEW REPORT FROM INPUT

EDI Strategies for Success: Opportunities for Growth and Profits

Call, Mail or Fax Your Order Today

Order Form | INPUT's Research Studies

Yes!
Please enter my order as described:

EDI Advanced Services

☐ $1,620 if ordered by February 22, 1990
☐ $1,800 if ordered after February 22, 1990

Take an additional 5% OFF if check included with order!

TERMS OF PAYMENT
Payment in full is due within 30 days of invoice date.

❑ Enclosed is my check in the amount of $________________.
❑ Bill my company on purchase order number ______________ in the amount of $__________________.
❑ Charge $______________ to my American Express #______________________.
Exp. date ________________ Signature ___________________________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

CONDITIONS AGREEMENT
The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

Accepted By INPUT:

Signature

Name

Title

Date

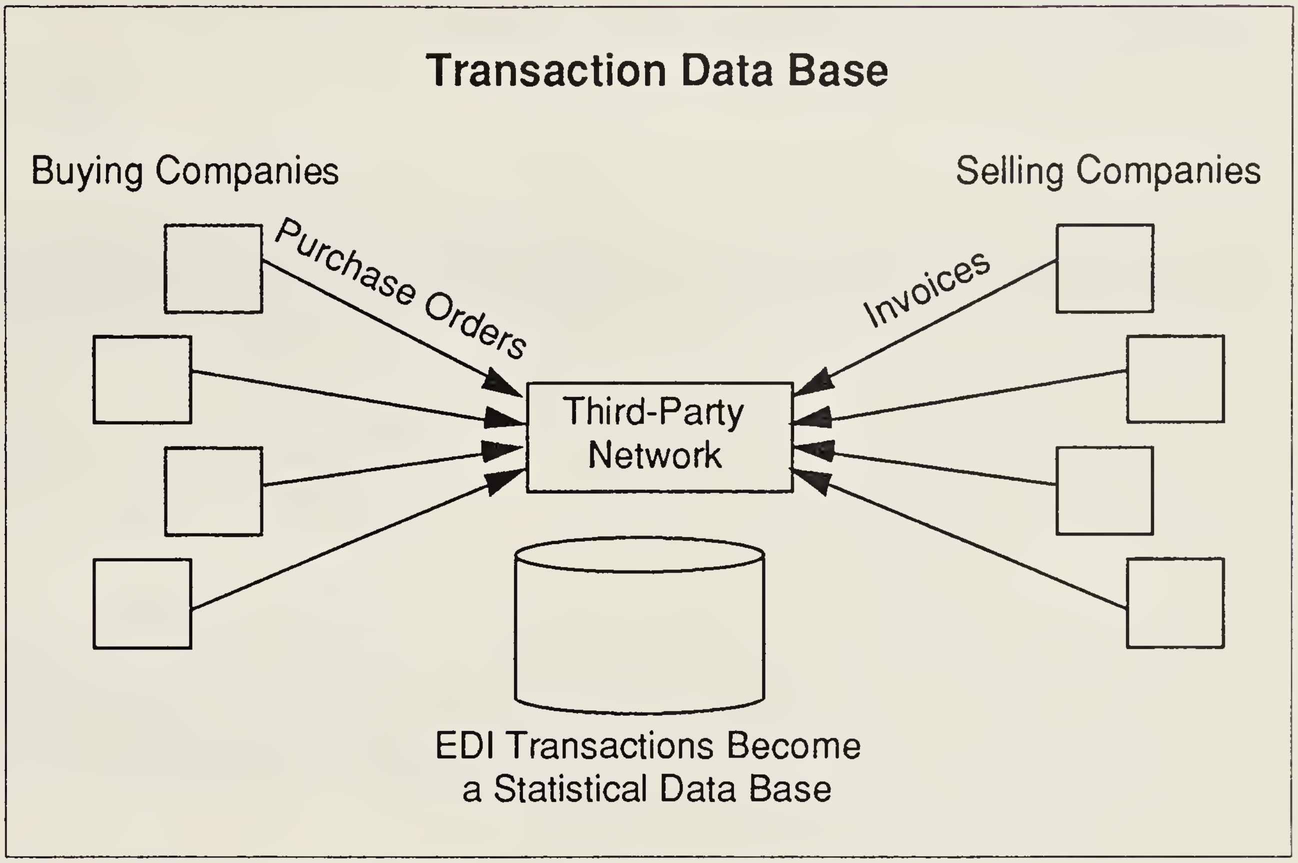
EASR 1/90dm

INPUT

Growth and Profit in the 1990s

Be Prepared to Compete

Both vendors and users who really understand the opportunities and pitfalls of advanced EDI services will gain a significant competitive advantage. Vendors who identify their market niche correctly, avoiding areas where product homogenization and competition is already eroding margins, can realize dramatic profits in the 1990s. Users with the know-how to develop their own applications or invest in the right vendor offerings can streamline their services, eliminate accounting and inventory errors, move products faster, and expand their range of trading partners. INPUT's *EDI Advanced Services* gives both vendors and users the information they need to gain the competitive edge.



EDI transactions create a statistical data base capable of providing valuable market data and analysis.

Optimize your EDI Operations and Profits

Advanced EDI services mean new sources of revenue for companies in the know. Opportunities for creating revenue by optimizing value-added EDI services are proliferating. Integrated systems that trigger electronic payments when goods arrive at the warehouse save time and money. The ability to check and verify incoming EDI messages interactively makes just-in-time inventorying possible.

Retail users can streamline their operations by downloading product line codes into standardized data bases so their buyers can update their internal systems. Advanced EDI systems can automatically calculate replenishment purchase orders and compile valuable market share data. Levi Strauss, Playtex, and American Airlines are among the companies who have discovered the profit-making potential of advanced EDI services.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

Find out where the real opportunities exist in the Federal EDI market

U.S. EDI Federal Markets, 1989–1994

- UNDERSTAND the commercial factors driving federal EDI
- POSITION your company's marketing and product offerings according to agency needs and product selection criteria
- TARGET the product categories that represent high growth in this market
- DEVELOP the sales and pricing strategies needed in marketing to the government
- IDENTIFY competitors and potential teaming partners

You will find:

- Market forecasts through 1994
- Defense and civil agency requirements and trends
- Competitive analysis and profiles
- Strategies and market opportunities

Call, mail, or fax your order to INPUT
at any office listed on the back of this brochure

Play a role in the Federal Government

The federal government, in its efforts to improve productivity through information technology, is adopting EDI in a big way. By a government-wide mandate, the federal government is requiring electronic linkage with private sector companies and other government agencies. The federal government provides lucrative opportunities to vendors of EDI products and services—if they understand the unique characteristics, requirements, and purchasing procedures of the federal sector.

The *U.S. EDI Federal Market, 1989–1994* report gives you vital information you need to understand and plan for EDI opportunities in the federal government. This report is a complete analysis of this major force in the EDI market and addresses all the major issues confronting the market.

U.S. EDI Federal Market
• Market Analysis and Forecast • Federal Agency Requirements and Trends • Competitive Trends • Key Opportunities
Agency Perspectives
• Functional Requirements • Performance Criteria • Laws, Policies, Regulations • Acquisition Plans and Preferences • Vendor Performance
Vendor Perspectives
• Vendor Participation • Market Issues • Vendor Selection and Performance • Teaming Patterns

WHAT ARE THE PRESSURES IN THE FEDERAL EDI MARKET?

Understanding the commercial and budgetary pressures that are increasing EDI implementation in government agencies is vital to developing growth strategies in this market. Commercial expectations, agency staffing inadequacies, and the government's reliance on information technology are discussed in terms of their impact on the federal EDI market. Industry concerns, such as security, legal issues, and budgetary constraints, are also analyzed.

HOW DO WE MARKET EDI PRODUCTS AND SERVICES TO THE FEDERAL GOVERNMENT?

Effective marketing to the government requi[illegible] a thorough knowledge of federal EDI applicat[illegible] and priorities and the unique procurement mechanisms in government agencies. This report explores the specific EDI applications important to government agencies, product requirements, and unmet needs.

In addition, the report reviews the sales issues unique to the federal market, including procurement policies and preferences, vendor selection criteria, and existing contracts and programs.

WHERE DO MARKET OPPORTUNITIES EXIST IN THE FEDERAL MARKET?

This report forecasts market size and growth rates across the major delivery modes comprising the EDI market in order to provide you with flexible assessments of market opportunity. Each forecast is based on stated assumptions and analysis of major trends in the market. By providing accurate and substantiated market forecasts, this INPUT report is the starting point for your successf[illegible] market and strategic plans.

massive adoption of EDI

FEATURES AND BENEFITS OF THIS REPORT

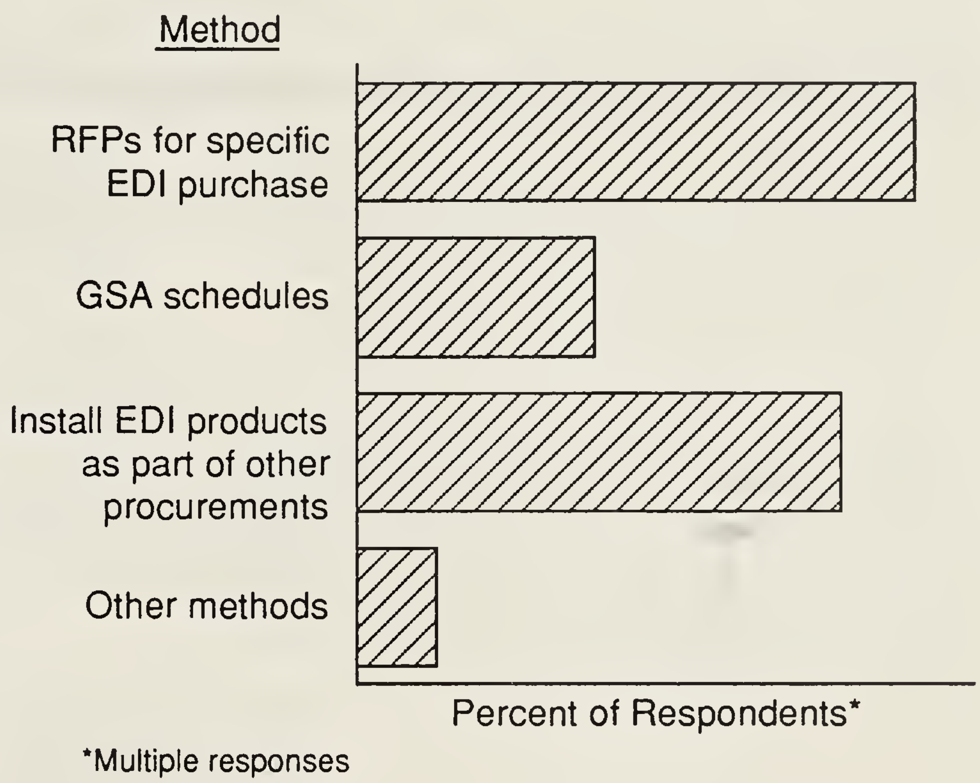
U.S. EDI Federal Markets is based on research of agency long-range plans for EDI programs and new system installations. Federal agency officials and EDI vendor executives were interviewed to obtain information on agency plans and product development strategies.

As a comprehensive analysis of the important competitive factors and considerations in the federal EDI market, this report is an indispensable planning tool to marketing and operations executives and managers who plan to take advantage of this growing opportunity.

The *U.S. EDI Federal Market* report is one of a series of INPUT EDI analysis reports. Other reports in the program include:

- *EDI Intertrends—North America*
- *EDI Intertrends—Europe*
- *Advanced EDI Services*
- *EDI User Case Studies*
- *North American EDI Service Provider Profiles*
- *North American EDI Software Provider Profiles*
- *EDI and Professional Services*
- *Vertical Market EDI Directions and Potentials*
- *EDI Software: Products, Issues, Market Trends*
- *EDI and X.400*

Agency Use of Procurement Methods



Source: INPUT

AVAILABLE DECEMBER 1989

Call INPUT today to get your copy shipped immediately

Call, mail, or fax your order to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

Information Services Industry

Market Analysis Program—U.S.

Market Analysis Program—U.S.

INFORMATION SERVICES—A $200 BILLION OPPORTUNITY

The U.S. market for information services is now at the $100 billion level and will reach nearly $200 billion by the end of 1994.

INPUT's Market Analysis Program provides a unique set of services to help you **succeed** in this dynamic and fragmented market.

YOU AND THE COMPETITION

Users can be served through a variety of delivery modes, and each industry uses a different mix of information services. Competition for these services is keen, and the capabilities and directions of competitors are important aspects of a vendor's business plan.

INPUT continually assesses the competitive position and market strategies of the leading information services firms in the U.S. and Canada.

INPUT FOR YOUR MARKET PLANNING

INPUT's Market Analysis Program provides the following **market analysis reports** to help you understand and capitalize on this important market:

Industry/Market Sector Reports—Specific industry sectors are examined in this series.

Delivery Mode Reports—Five delivery modes are also analyzed in depth.

HOW DO YOU BENEFIT?

- Comprehensive analysis of your markets
  - What drives demand for your services?
  - How big is the market/how fast is it growing?
  - Who is the competition/what are they doing?
- High-quality support
  - Senior professional staff
  - Frequent contact with key vendors and users
  - In-depth research and analysis
  - Constant interaction with clients

REPORT CONTENTS

Industry/Market Sector Reports contain the following information for each sector covered:

- **Industry/Market Definition**
  The market structure is defined and demographic data presented (number of firms, segmentation, growth rates, etc.)
- **Trends and Issues**
  Key business and technology trends that affect the sector are identified. Emphasis is on user issues and the way that changes in business operations affect the sector's use of information technology.
- **Market Forecast/Analysis**
  Forecasts are presented for each delivery mode. Factors that affect demand are identified and related to key applications in the sector.
- **Competitive Environment**
  Leading vendors are profiled and market sha[illegible] indicated for each delivery mode.
- **Conclusions and Recommendations**
  Specific recommendations are made for competing effectively in this sector.

Delivery Mode Reports provide a cross-industry analysis of the trends, opportunities, and competitive issues in specific service areas. Each delivery mode is broken out into several submodes, with market forecasts structured by industry, hardware platform, and other applicable categories. Typical issues addressed include:

- **Processing Services**
  - In-house vs. processing services trade-off
  - Impact of distributed data bases/processing
- **Network Services**
  - Applications and delivery mechanisms
- **Software Products**
  - Relationship to other "application solution" markets (processing services, turnkey)
  - Impact of standards (SAA, open systems)
  - Evolution of data base management systems
- **VAR/Turnkey Systems**
  - Pricing strategies and distribution channels
  - Maintenance and support requirements
- **Professional Services**
  - Contracting/alliance strategies
  - Relationship to systems integration market

INPUT®

CLIENT SUPPORT

In addition to these in-depth research reports, INPUT provides a wide variety of support services to its clients:

- **Research Bulletins**
  Periodic Research Bulletins give you INPUT's analysis of current issues and trends.
- **Access to INPUT Consultants**
  Clients receive continuous support from INPUT's consultants and executives. Call them for reactions, opinions, and ideas.
- **"Hotline" Inquiry Service**
  The "hotline" inquiry service supports small-scale research needs (requiring less than two hours) and provides clarification/amplification of report and presentation data.
- **On-Site Presentation**
  INPUT consultants present research results and industry forecasts at your site and relate this information to your specific service markets.
- **INPUT Conference**
  This conference updates INPUT's clients on key industry developments and trends, and provides a forum for discussions with INPUT senior staff and executives of other client firms.

RELATED SERVICES

Other services are also available to meet specific client needs:

- **Market Analysis Program (Europe)**
  Parallels U.S. program in the European market.
- **Systems Integration/Operation Programs (U.S. and Europe)**
  Provide detailed analysis of these two emerging delivery modes.
- **Vendor Analysis Programs (U.S. and Europe)**
  Provide profiles and support data on information services vendors in North America and Europe.
- **Custom Research and Consulting Services**
  INPUT's professional staff is available for a variety of projects, including strategic planning, competitive analysis, specialized market/product evaluation, and merger/acquisition support.

PROGRAM DESCRIPTION

INDUSTRY/MARKET SECTOR COVERAGE

- Banking and Finance
- Insurance
- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Wholesale Distribution
- Retail Distribution
- Utilities
- Telecommunications
- Technical/Business Services
- Medical
- Education
- Federal Government
- State & Local Government
- Miscellaneous Industries
- Cross-Industry Applications

DELIVERY MODE COVERAGE

- Processing Services
- Network Services
- Software Products
- VAR/Turnkey Systems
- Professional Services/Systems Integration

CLIENT SUPPORT SERVICES

- Research Bulletins
- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Presentation
- Client Conference

- **Consultant Presentations**
  INPUT consultants provide presentations and lead meetings or seminars for strategic planning, business development, etc.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/ consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

When You Absolutely *Have To Know* What's Happening in the U.S. Systems Software Product Markets . . .

- Which market segments are growing fastest?
- Who are the competitors you have to watch for?
- Who's winning the standards battles?
- Why is the CASE market sluggish?
- How will changes in UNIX, cooperative processing, and RDBMSs affect you?

...You Have To Have the Latest Report from INPUT!

To make money in systems software products today, you need targeted intelligence that pinpoints the opportunities—and the risks—in a market that has become one of the fastest growing areas of the information industry.

INPUT will soon release a new report that concentrates this market intelligence in a single volume. Entitled *U.S. Systems Software Products Market, 1990-1995,* the report gives you a powerful weapon you can use to make the right decisions in an increasingly complex competitive environment.

At the regular list price of $2,995, it is a tremendous value.

U.S. Systems Software Products Market, 1990-1995
Issues and Trends
• General Business • Information Services Industry • Key Issues and Trends for the 1990s • Future Issues and Trends
Competition
• Key Strategies • Mergers and Alliances • Market Share • Shifting Market Structure
Market Forecast
Profiles
Conclusions and Recommendations

But if you act before December 31, 1990
you'll pay the pre-publication price
—$300 less than the regular price—
a savings of over 10 percent!

Why not get the best information available on a market whose developments could have a tremendous impact on your company's fortunes?

A Tool for Strategic Marketing

The report offers you excellent five-year market numbers, of course.

But it doesn't stop there. *U.S. Systems Software Products Market, 1990-1995* divides the market into three broad categories: Systems Control, Data Center Management, and Applications Development Tools. It then focuses on the issues you have to address in three platforms within each category: mainframes, minicomputers, and PC/workstations.

The report is therefore a powerful tool for strategic marketing, answering questions such as:

- Precisely where are the growth opportunities in nine market categories, and what forces are driving or hindering that growth?
- How will users' responses to the competing pressures of industry and proprietary standards affect *your* business?
- How successful will UNIX really be as a commercial operating system?
- How is the market for relational data base management systems changing, and how will those changes affect you?
- Where are the opportunities in cooperative processing?

And other large-scale questions that have a major impact on your strategic outlook.

INPUT®

1280 Villa Street, Mountain View, CA 94041-1194 (415) 961-3300
FAX (415) 961-3966

Dear Colleague:

The systems software market continues to grow rapidly, but in some unexpected ways, it is beginning to require much more information to make good decisions in this market.

INPUT has just released a report entitled *U.S. Systems Software Products Market, 1990-1995* that gives you this information in a concise and well-organized format, making the report one of the most useable competitive weapons available.

The role of standards, the rise of UNIX, the tactical and strategic moves of the big market players, developments in data bases and networking, the sizes and growth rates of key market segments—the report discusses all of these and more.

This is more than data. It is targeted market intelligence, and the research of experienced analysts, that give you the answers you need in a format you can use immediately.

Why settle for guesswork? Get the facts. Read the enclosed brochure for more details, or use the order form to get a copy of INPUT's report, *U.S. Systems Software Products Market, 1990-1995,* today.

Regards,

Doug Tayler
Director of Research

ORDER FORM

YES! I have to know what's going on in the systems software products markets. I need INPUT's report, *U.S. Systems Software Products Markets, 1990-1995.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE:
MY ORDER

Send me ________ copy (copies) of INPUT's report, *U.S. Systems Software Products Markets, 1990-1995* at the fee of $2,995.

SECTION TWO:
TERMS OF PAYMENT
(CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:
Card # ______________________________
Exp. date ____________
Name as it appears on my card ______________________________
Signature ______________________________

☐ Bill my company for $ ______________ on purchase order number ______________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE:
AUTHORIZATION

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

____
Signature

____
Name

____
Title

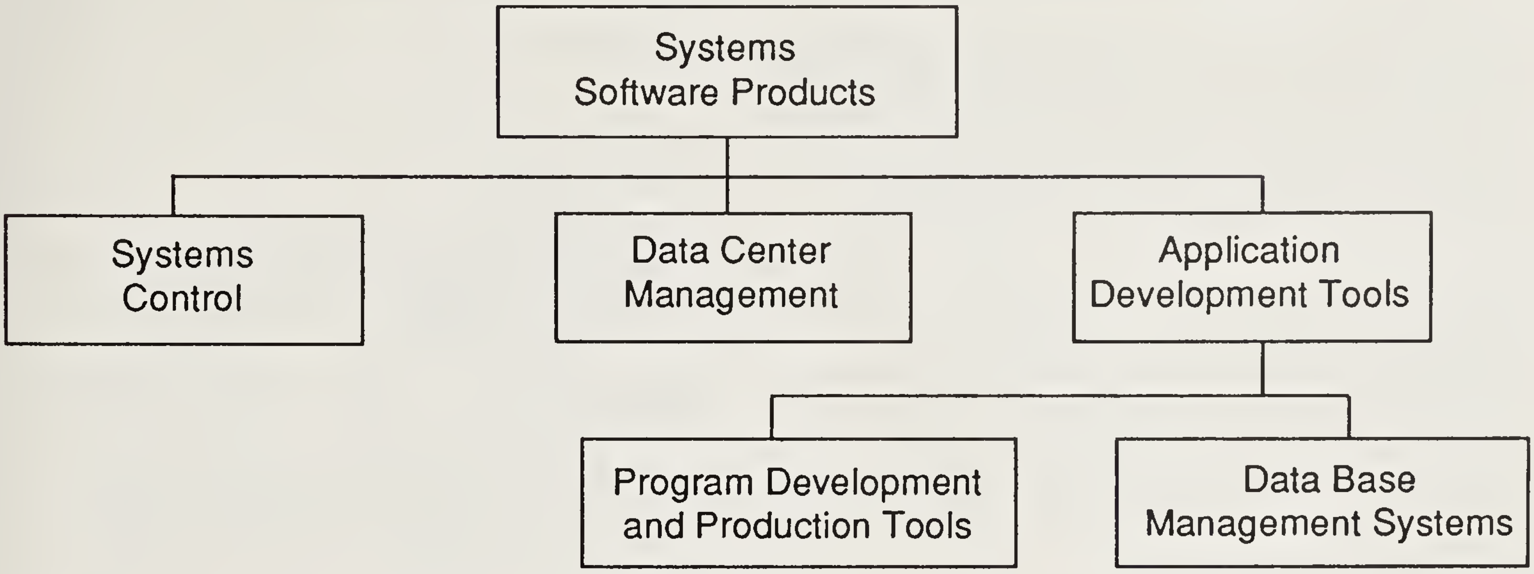
____
Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

MASOF 11/90

CONDITIONS AGREEMENT

Systems Software Products Market Structure



INPUT's analysis differentiates the forces impacting each of these segments.

Operational Intelligence

In addition, the report looks at tactical, competitive issues whose analysis can be useful in day-to-day operations:

- Are the open systems hardware vendors as deeply committed to UNIX as they say they are?
- Why are some companies concentrating so many resources on data center management software?
- Why is the use of CASE tools growing as slowly as it is?
- How are the minority investments of IBM, EDS, DEC, and others changing the systems software products markets?
- How will the trend toward outsourcing data center management affect you?

And more on everything from "lights out" data centers to the minitrend of bundling free data base software with many different kinds of operating systems software.

A Double Value

INPUT's report, *U.S. Systems Software Products Market, 1990-1995,* is the kind of competitive weapon that is doubly valuable to you—because it gives you clear answers to difficult questions, and because it would be literally impossible to duplicate the research and analysis that created it.

INPUT's systems software product analysts know the market from both sides. They have decades of experience as users and vendors, and have tracked the developments in this pivotal

INPUT®

Call, fax, or mail your order to any INPUT office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research; technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT Offices

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
Atrium at Glenpointe
400 Frank W. Burr Boulevard
Teaneck, NJ 07666
Tel. (201) 801-0050
Fax (201) 801-0441

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

If You Compete in the Processing Services Markets. . .

- What is the market's overall size and growth rate?
- Which segments of the market are growing fastest? Slowest?
- How are user demands changing processing services?
- What successful strategies are other vendors using?
- What do their five-year financials look like?

INPUT's Processing Services Market Survey Can Give You the Edge You Need

It's a market that continues to astound the nay-sayers. For years, people have said processing services were dead. And for years, processing services vendors have had an unbroken record of profitable growth.

INPUT has just published a report that gives you carefully researched, up-to-the-minute information on what's going on in processing services, and how you can be sure to participate in the market's steady growth.

U.S. Processing Services Markets 1989-1994
Processing Services
• Issues and Trends • Market Forecasts • Mergers and Acquisitions
Transaction Processing Services
• Overview • Sector Markets
Utility Processing Services
• Issues and Trends • Market Forecasts
Other Processing Services
• Issues and Trends • Market Forecasts
Systems Operations
• Issues and Trends • Market Forecasts • Competitive Environment
Vendor Activities and Profiles
• Vendor Activities • Public Company Performance • Vendor Profiles

And if you act before June 15, 1990, you'll pay $250 less than the regular list price for the report—a savings of 10%!

The report, *U.S. Processing Services Markets, 1989-1994*, provides in-depth analyses of the trends and market forces shaping the future growth of four different processing services markets:

- **Transaction Processing Services**, in seven of the fastest growing vertical markets: discrete manufacturing, banking and finance, insurance, medical, telecommunications, transportation, and human resources
- **Utility Processing Services**, generalized services customers use to perform a range of processing and to develop and run custom programs
- **Other Processing Services**, including specialized services like output microfilm, disaster recovery, and scanning
- **Systems Operations**, facilities management using vendor-supplied systems

For each of these service delivery modes, INPUT's survey gives a five-year market forecast, investigates the forces acting on the market to enhance or inhibit its growth, and analyzes leading vendors' product offerings, strategies, and financial profiles.

The report answers the following kinds of questions:

- What role has the demand for innovative industry-specific applications had in shaping today's services vendors?
- How is the trend toward outsourcing growing, and how can vendors take advantage of the success enjoyed by IBM, EDS, and Litton?
- Why has the development of PCs and high-powered workstations not killed demand for processing services?
- How are vendors addressing customer objections about lack of control?

ORDER FORM

YES! I need a competitive edge in the processing services markets. Send me a copy of INPUT's newest report, *U.S. Processing Services Markets, 1989-1994.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, ***U.S. Processing Services Markets, 1989-1994.***

☐ I want to pay $2,250, a savings of $250 off the regular price. I'm ordering before June 15, 1990.

☐ I'm ordering after June 15, 1990, for the regular price of $2,500.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:
Card # ________________________________
Exp. date ____________
Signature ________________________________

☐ Bill my company for $ ______________ on purchase order number ____________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

Signature

Name

Title

Date

MAN1 5/90

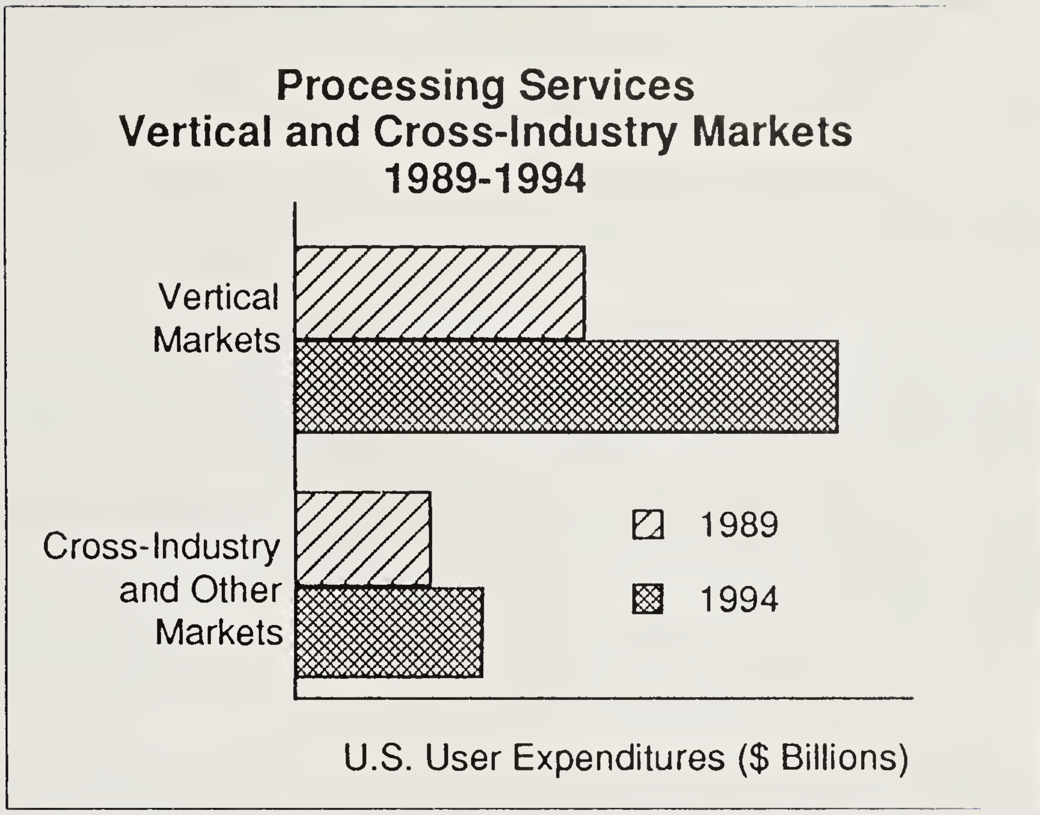
INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

CONDITIONS AGREEMENT

INPUT®

- How will international restrictions on transborder data flow affect the globalization of the processing services industry?
- Why have some vendors failed to adequately control the costs of processing services?
- How are vendors expanding their product mix to include software products, turnkey systems, systems integration, and professional services?

And more...



THE SHIFT AWAY from cross-industry processing services to services more closely targeted to specific vertical markets is clear in this graph from INPUT's newest survey of the processing services markets.

Comprehensive

In addition to thoughtful analyses of large-scale issues and market trends, INPUT's research staff spent hundreds of hours putting together one of the most comprehensive and authoritative collections of market survey data ever gathered for processing services.

INPUT's data base gives vendors a long look into how the size and growth rates of significant markets and vendors are changing, including:

- How will the annual growth percentages (nominal, deflator, and real) change over the next five years?
- How will the relative rankings of back-office processing, credit card processing, and credit authorization change in the banking industry over the next five years?
- How will the massive expenditures on turnkey systems open the market for systems operation services in the medical market?
- What are the industry and geographic markets of the largest processing services vendors?
- What are their various revenue sources?
- What are their key products and services?

Will ISDN be a help or a hindrance to processing services providers? How can mergers and acquisitions affect your performance? How will your company exploit the tremendous opportunities afforded by consumer processing services?

INPUT's report, *U.S. Processing Services Markets, 1989-1994*, gives you the answers that can provide a competitive edge in processing services.

Use the enclosed form to order your copy today!

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person—including parent, subsidiary, or affiliated organizations—without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT®

1280 Villa Street, Mountain View, CA 94041
415-961-3300 Fax 415-961-3966

Dear Colleague:

Do you need intelligence on the relative size and growth rates of processing services markets, by delivery mode and market segment? Would you like to know how successful vendors are responding to the advent of ISDN, mergers and acquisitions, transborder data flow restrictions, and the looming new market for consumer processing services?

INPUT has just released the newest volume of its respected annual survey, *U.S. Processing Services Markets, 1989-1994*. The report provides processing services vendors with timely and exhaustively researched market intelligence on the trends, forces, and players shaping the future of processing services.

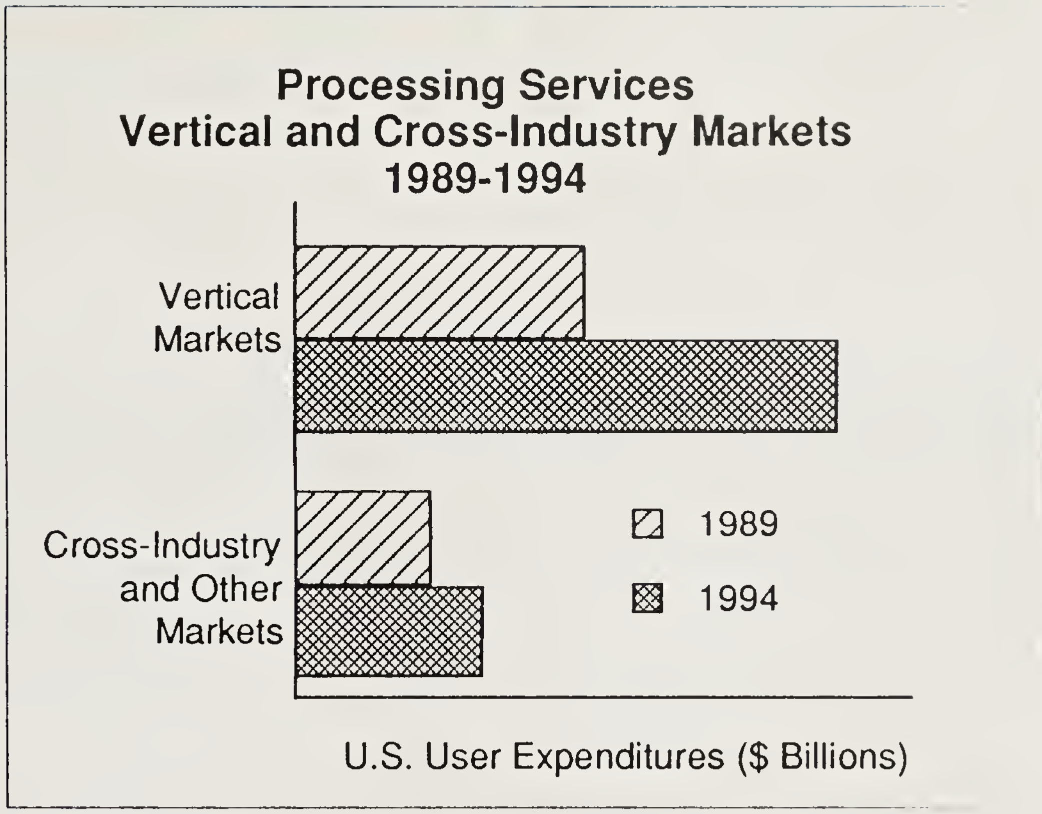
The report is based on interviews with more than 500 information services vendors, including nearly all of the 250 largest companies. The information in those interviews can give a distinct competitive advantage to all processing services marketers, no matter what their size, product orientation, or geographic location.

You need more than guesswork on these issues. You need hard data and thoroughgoing analysis of all the factors affecting these changing markets.

INPUT's new report offers you all of that. Order it today.

Regards,

Norman G. Litell
Director, Market Analysis Program



THE SHIFT AWAY from cross-industry processing services to services more closely targeted to specific vertical markets is clear in this graph from INPUT's newest survey of the processing services markets.

- How will international restrictions on transborder data flow affect the globalization of the processing services industry?
- Why have some vendors failed to adequately control the costs of processing services?
- How are vendors expanding their product mix to include software products, turnkey systems, systems integration, and professional services?

And more…

Comprehensive

In addition to thoughtful analyses of large-scale issues and market trends, INPUT's research staff spent hundreds of hours putting together one of the most comprehensive and authoritative collections of market survey data ever gathered for processing services.

INPUT's data base gives vendors a long look into how the size and growth rates of significant markets and vendors are changing, including:

- How will the annual growth percentages (nominal, deflator, and real) change over the next five years?
- How will the relative rankings of back-office processing, credit card processing, and credit authorization change in the banking industry over the next five years?
- How will the massive expenditures on turnkey systems open the market for systems operation services in the medical market?
- What are the industry and geographic markets of the largest processing services vendors?
- What are their various revenue sources?
- What are their key products and services?

Will ISDN be a help or a hindrance to processing services providers? How can mergers and acquisitions affect your performance? How will your company exploit the tremendous opportunities afforded by consumer processing services?

INPUT's report, *U.S. Processing Services Markets, 1989-1994*, gives you the answers that can provide a competitive edge in processing services.

Use the enclosed form to order your copy today!

Call, fax, or mail your order to INPUT
to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

MAN1 5/90

INPUT®

Do You Need Good Information on the Network Services Markets?

- How big is the network services market and how fast is it growing?
- How have EDI, ISDN, and cellular technology altered the market?
- What are the RBOCs doing in network services?
- What impacts will high-bandwidth fiber optic networking have?
- What parts of network services are growing fastest?

INPUT's New Report Has It

The explosive market for networking and data communications services has challenged marketers for years. It's been simply too fragmented, too fast-changing, too legally and technically intricate to pin down easily.

But now INPUT, one of the most respected names in computer industry market research, has released a new survey called *U.S. Network Services Markets, 1989-1994*. The report covers the entire range of technological and market developments in network services and gives you an effective tool for gaining competitive advantage in specific network markets.

This report is the latest edition of INPUT's respected survey of this sector of the information services market.

U.S. Network Services Markets 1989-1994
Network Services Market
• Issues and Trends • Regional Bell Operating Company Activities • Market Forecasts • Network Services Vendor Profiles
Electronic Data Interchange Market
• Market Developments • EDI Market Forecast • Significant Events and Trends • Opportunities and Recommendations
Electronic Information Services Market
• Market Developments • Electronic Information Services Vendors • EIS Vendor Profiles

And if you act before June 29, 1990, you'll pay $250 less than the regular list price for the report—a savings of 10%!

The far-reaching technological developments of the last few years have made the network services market much more difficult to summarize and understand. INPUT's report gives you five different kinds of information that help you analyze the essential dynamics of the market:

- A review of driving forces and trends for three market areas: network services, network application services, and electronic information services
- Calculations of market sizes and growth rates
- Profiles of leading vendors
- An in-depth look at EDI
- A survey of electronic information services markets

Strategic Issues

The forces at work on these markets raise significant questions for vendors' present and future market position and strategies:

- How has the pressure for product differentiation affected the competitive environment, and how can you profit from it?
- How fast will the market for consumer-oriented network services evolve, and how should you respond?
- How will industry consolidation influence pricing? Competition? Product differentiation?
- What role will EDI play in the new services marketplace, and how will it affect you?
- Will the RBOCs be major competitive factors in the future? What are their strengths and weakenesses?
- How will the development of digital virtual private networks (VPNs) and metropolitan ar networks (MANs) provide new product development opportunities?

INPUT®

1280 Villa Street, Mountain View, CA 94041
415-961-3300 Fax 415-961-3966

Dear Colleague:

Could you use reliable and timely market intelligence on the size of the U.S. network services markets? Would analyses of the forces acting on them be helpful? Do you wonder about how the most successful vendors stay on top of a market whose technology and regulatory environment changes so rapidly?

INPUT provides all of that in its newest report, *U.S. Network Services Markets, 1989-1994*. This report offers some of the most thorough and insightful research ever conducted on this topic.

INPUT spoke to 500 network services vendors, including nearly all of the 250 largest. Then researchers organized that intelligence into the most useful market categories: network services, network applications services, electronic information services, and vendor profiles. INPUT also gives you a bonus: two in-depth treatments of the exciting new areas of electronic data interchange and electronic information services.

You need hardheaded analysis of these issues. You need to know how markets are changing, and why they are changing. You need to know how your competitors are responding to the same challenges you face.

INPUT's new report offers you all of the above. Order it today.

Regards,

Norman G. Litell
Director, Market Analysis Program

ORDER FORM

YES! I'd like to have a competitive advantage in the network services market. Send me INPUT's latest report, *U.S. Network Services Markets, 1989-1994.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, ***U.S. Network Services Markets, 1989-1994.***

☐ I want to pay $2,250, a savings of $250 off the regular price. I'm ordering before June 29, 1990.

☐ I'm ordering after June 29, 1990, for the regular price of $2,500.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:
Card # ____
Exp. date ____________
Signature ____

☐ Bill my company for $ ______________ on purchase order number ____________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

Organization ________________________

Name ________________________

Title ________________________

Address ________________________

____

Telephone ________________________

Signature ________________ Date ________
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

Signature ________________________

Name ________________________

Title ________________________

Date ________________________

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

MAN2 6/90 dm

CONDITIONS AGREEMENT

INPUT

Competitive Analysis

The report also concentrates on the particulars of network services and gives you careful market analyses, projections, and in-depth profiles of major vendors. INPUT utilizes its years of research and consulting experience to produce information that will help you answer some of the most crucial questions about these companies and new technologies:

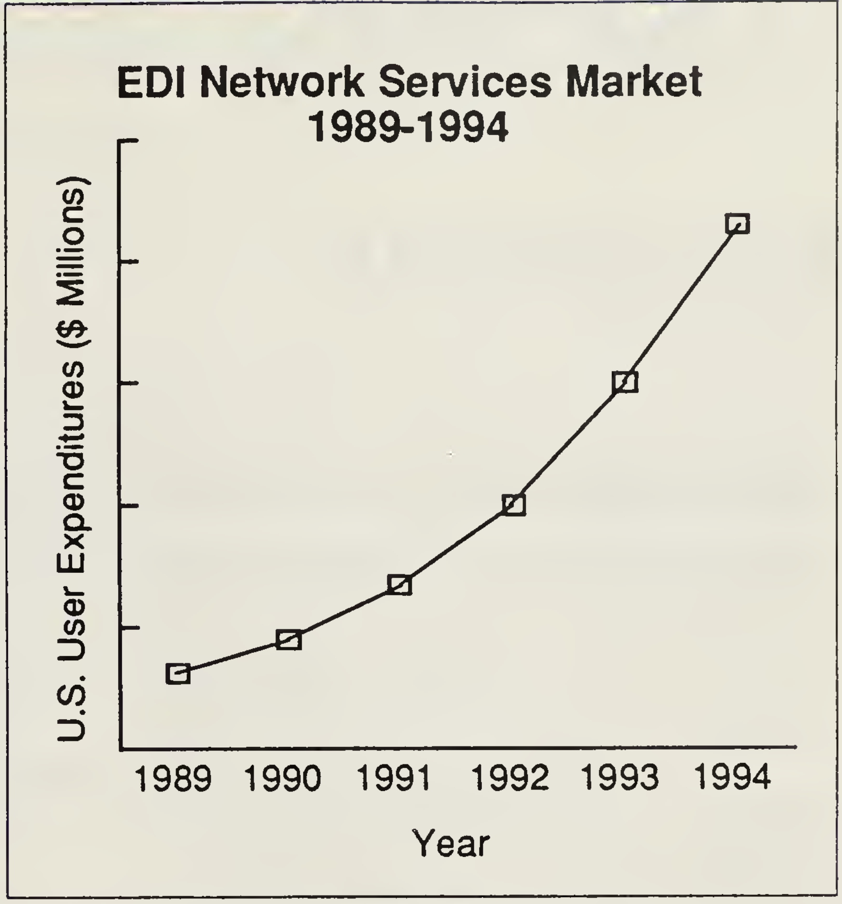
- What parts of the market are growing fastest and how can you benefit?
- How has low-cost PC and CD ROM technology affected the market potential for on-line data base services?
- How are the largest and most successful vendors in these markets responding to market and technological change?
- How are giants like Dow Jones and Dun & Bradstreet handling the completely new challenges coming from entities like the RBOCs?

The report answers these and many other questions about issues that can have a profound effect on the most important business of all in the network services arena—*yours*.

Network services has long been touted as one of the hottest segments in the information services market, but practical and closely reasoned market analysis has always been difficult. INPUT has solved that problem, producing a report based on interviews with 500 vendors, including nearly all of the 250 largest. INPUT took that research data base and packaged it in a terse, no-nonsense report that takes a hard look at the kinds of questions you have to answer every day.

The Future of Network Services

Will remote network management services be a major delivery mode in the near future? Will network service providers feel the heat of the merger and acquisitions game? Will the hypothetical global communications infrastructure be completed anytime soon, and what kinds of product development opportunities will that infrastructure give vendors?



THE DRAMATIC RISE in end-user expenditures on electronic data interchange is evident in this graph from Chapter IV.

INPUT's report, *U.S. Network Services Markets, 1989-1994*, was conceptualized, researched, and written to give you straight answers to these questions and many others that could change the way you do business.

INPUT would like to give you a competitive advantage in one of the most competitive markets in the world.

Use the enclosed form to order your copy today!

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

MAN2 5/90

INPUT®

If You Have Questions about Success in the Turnkey Systems Markets . . .

- ➤ How are standards changing the marketing rules?
- ➤ How big are these markets? How fast are they growing?
- ➤ How can marketers avoid the commodity-pricing crunch?
- ➤ Are support services a competitive advantage?
- ➤ Which vendors are succeeding, and why?

...INPUT Can Give You the Answers!

To make the right decisions in turnkey systems markets these days, you have to have targeted intelligence on market size and growth rates, major trends, and successful vendor strategies.

INPUT's new report on *U.S. Turnkey Systems Markets, 1989-1994,* a powerful competitive weapon, gives you all of that market intelligence, and more.

And if you act before May 15, 1990, you'll pay $250 less than the regular list price for the report—a savings of 10%!

U.S. Turnkey Systems Markets 1989-1994
Market Size and Forecast
Issues and Trends
Value-Added Reseller Survey
• Hardware/Software Platform Support • Selection Criteria • Platform Vendor Support Characteristics • Distribution Channel Conflict • Value-Added Product Features • Product Support Provided by Turnkey Systems Vendors • Marketing Approach • Geographical Markets • Product Expansion Plans • VAR Market Issues • Successful Turnkey Systems Strategies • Profitability and Revenue Growth • Competition
Competitive Environment
Supporting VARS
Conclusions and Recommendations

The report is a distillation of months of research designed to help turnkey systems companies shape successful business strategies by answering crucial questions about their markets:

- How large will the turnkey systems markets be in five years, and how fast are they growing?
- What are the aggregate revenues of turnkey systems vendors by company size, and what are their growth rates?
- What are the fastest growing segments of the turnkey systems markets, by mode of delivery and by product and service components? Which segments are growing slowest?
- What are the relative sizes and growth rates for industry-specific and cross-industry markets?
- Exactly how large a share of the total market is accounted for by network services? By application software? By professional services?

This market data alone would be a powerful argument for obtaining INPUT's report. But we give you even more.

Market Trends, Vendor Profiles

The turnkey systems markets have been in a state of flux recently, reacting to major technological and business trends. *U.S. Turnkey Systems Markets, 1989-1994,* tracks those trends for you, analyzing how they are developing and how they are likely to affect your business:

- Standardization has opened doors to growth, at the same time as it has put tremendous downward pressure on platform prices. INPUT examines how you can turn these contrary forces to your advantage.
- Channel conflict has become a major challenge for turnkey systems vendors. INPUT shows how some innovative lead-distribution and joint-marketing programs are turning conflicts into profitable collaborations.
- Tiered pricing offers advantages and disadvantages to almost every link in the distribution chain. INPUT analyzes the pros and cons for all parties.

INPUT®
1280 Villa Street, Mountain View, CA 94041
415-961-3300 Fax 415-961-3966

Dear Colleague:

Do you need targeted market intelligence on the size and growth rates of the turnkey systems markets? Could you use information on what strategies seem to be working best for the dominant turnkey systems vendors? Would concise analyses of market trends and issues like the use of standardized hardware, how users rate product quality, availability, and open systems architecture, and a breakdown of the total market by product type be useful?

INPUT has just released a report that answers all of those questions, and more. *U.S. Turnkey Systems Markets, 1989-1994*, is the most comprehensive analysis of this market available. In it, we investigate in detail the forces coming to bear on the turnkey systems markets, how the markets have changed, and how leading vendors have responded.

With the rate of change in turnkey systems increasing every day, doesn't it make sense to get market intelligence based on a timely analysis of hard data from primary sources?

INPUT's new report offers you all of that. Order it today.

Best regards,

Norman Litell
Director, Market Analysis Program

ORDER FORM

YES! I need answers to my questions about the turnkey systems markets! I need INPUT's report, *U.S. Turnkey Systems Markets, 1989-1994*, today!

I understand that I may call my order in, fax it to you at the number below, or send this form in by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, *U.S. Turnkey Systems Markets, 1989-1994.*

☐ I want to pay $2,250, a savings of $250 off the regular price. I'm ordering before May 15, 1990.

☐ I'm ordering after May 15, 1990, for the regular price of $2,500.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:
Card # ____
Exp. date ______________
Signature ____

☐ Bill my company for $ ______________ on purchase order number ____________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

Organization

Name

Title

Address

Telephone

Signature　　Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

Signature

Name

Title

Date

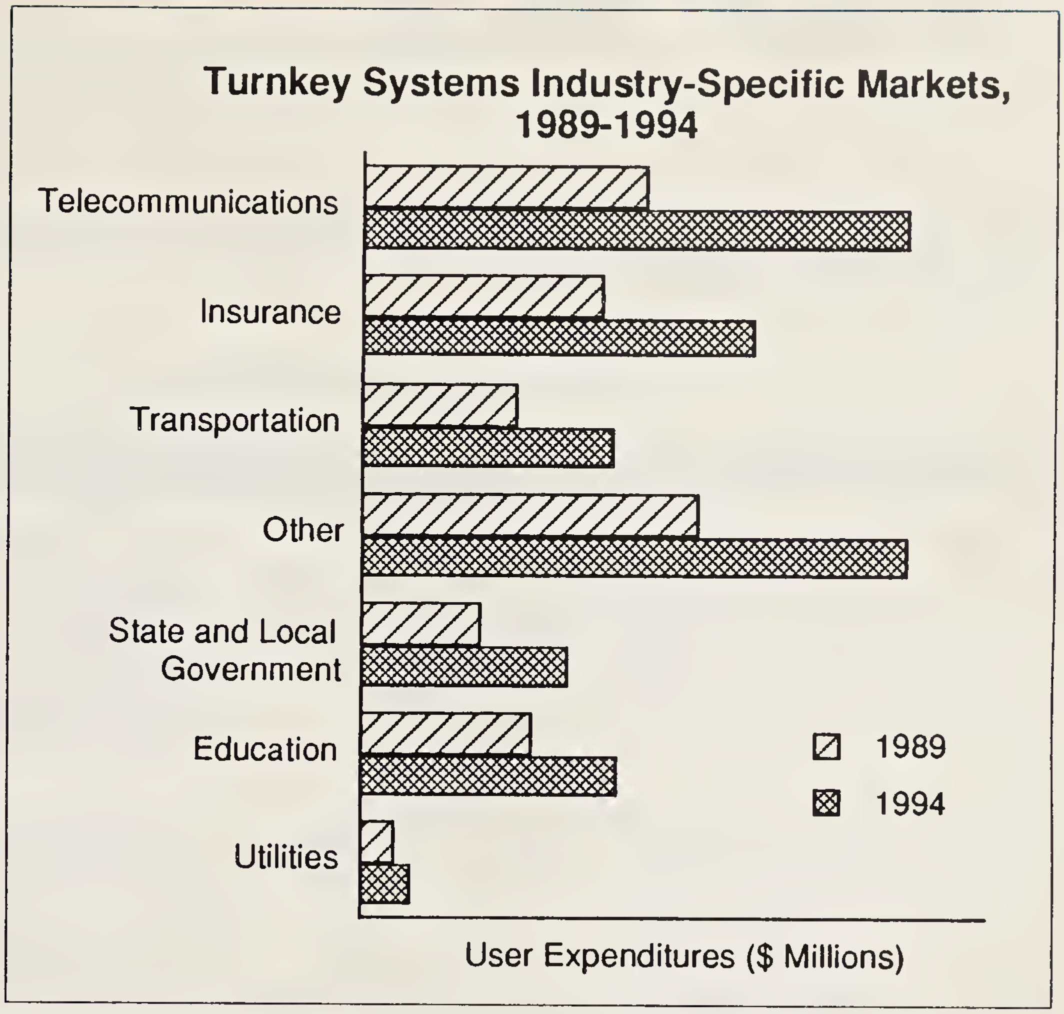
INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

MAN3 4/90

CONDITIONS AGREEMENT

INPUT

INPUT



USER EXPENDITURES for turnkey systems vary widely across various industries. INPUT's report pinpoints the size and growth rates of these expenditures for you.

- Cross-matching is one strategy for broadening your product offerings. INPUT points out some benefits, and some little-known pitfalls.

These are only a few of the trends treated in detail. Others include product and service extensions, strategic alliances, cooperation with consultants, gray market competition, and more.

In addition to market trends, INPUT's report also provides a thorough analysis of the competitive environment, including detailed analyses of the major players in the market:

- Who are the leading turnkey systems vendors?
- What strategies work best in this market for sales? For distribution?
- What do Autodesk, WordPerfect Corp., Neuron Data, Sybase, and other successful vendors have in common?
- How important are reliability, product quality, product availability, and open systems architecture for turnkey systems products?
- How have the stocks of public turnkey systems companies performed in the recent past?
- What are the products of major market players?
- What have their revenues been over the past three years?
- What are their geographic markets, their industry markets, their hardware platforms, their service and warranty policies?

And much more about the companies that in many cases are leading the changes sweeping these markets.

How those changes affect your company is up to you. You will make the decisions. How informed those decisions are will depend on the quality of the market intelligence you can get. INPUT gives you the best.

INPUT's *U.S. Turnkey Systems Markets, 1989-1994*, puts the resources of one of the most respected authorities on turnkey systems at your fingertips. It gives you the answers you need.

So get the market intelligence you have to have, and save 10 percent off regular list price. Use the enclosed order form to order your copy today!

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

MAN3 4/90

INPUT®

Information Services Industry

Market Analysis Program—U.S.

Market Analysis Program—U.S.

INFORMATION SERVICES—A $200 BILLION OPPORTUNITY

The U.S. market for information services is now at the $100 billion level and will reach nearly $200 billion by the end of 1994.

INPUT's Market Analysis Program provides a unique set of services to help you **succeed** in this dynamic and fragmented market.

YOU AND THE COMPETITION

Users can be served through a variety of delivery modes, and each industry uses a different mix of information services. Competition for these services is keen, and the capabilities and directions of competitors are important aspects of a vendor's business plan.

INPUT continually assesses the competitive position and market strategies of the leading information services firms in the U.S. and Canada.

INPUT FOR YOUR MARKET PLANNING

INPUT's Market Analysis Program provides the following **market analysis reports** to help you understand and capitalize on this important market:

Industry/Market Sector Reports—Specific industry sectors are examined in this series.

Delivery Mode Reports—Five delivery modes are also analyzed in depth.

HOW DO YOU BENEFIT?

- Comprehensive analysis of your markets
  - What drives demand for your services?
  - How big is the market/how fast is it growing?
  - Who is the competition/what are they doing?
- High-quality support
  - Senior professional staff
  - Frequent contact with key vendors and users
  - In-depth research and analysis
  - Constant interaction with clients

REPORT CONTENTS

Industry/Market Sector Reports contain the following information for each sector covered:

- **Industry/Market Definition**
  The market structure is defined and demographic data presented (number of firms, segmentation, growth rates, etc.)
- **Trends and Issues**
  Key business and technology trends that affect the sector are identified. Emphasis is on user issues and the way that changes in business operations affect the sector's use of information technology.
- **Market Forecast/Analysis**
  Forecasts are presented for each delivery mode. Factors that affect demand are identified and related to key applications in the sector.
- **Competitive Environment**
  Leading vendors are profiled and market shares indicated for each delivery mode.
- **Conclusions and Recommendations**
  Specific recommendations are made for competing effectively in this sector.

Delivery Mode Reports provide a cross-industry analysis of the trends, opportunities, and competitive issues in specific service areas. Each delivery mode is broken out into several submodes, with market forecasts structured by industry, hardware platform, and other applicable categories. Typical issues addressed include:

- **Processing Services**
  - In-house vs. processing services trade-off
  - Impact of distributed data bases/processing
- **Network Services**
  - Applications and delivery mechanisms
- **Software Products**
  - Relationship to other "application solution" markets (processing services, turnkey)
  - Impact of standards (SAA, open systems)
  - Evolution of data base management systems
- **VAR/Turnkey Systems**
  - Pricing strategies and distribution channels
  - Maintenance and support requirements
- **Professional Services**
  - Contracting/alliance strategies
  - Relationship to systems integration market

CLIENT SUPPORT

In addition to these in-depth research reports, INPUT provides a wide variety of support services to its clients:

- **Research Bulletins**
  Periodic Research Bulletins give you INPUT's analysis of current issues and trends.
- **Access to INPUT Consultants**
  Clients receive continuous support from INPUT's consultants and executives. Call them for reactions, opinions, and ideas.
- **"Hotline" Inquiry Service**
  The "hotline" inquiry service supports small-scale research needs (requiring less than two hours) and provides clarification/amplification of report and presentation data.
- **On-Site Presentation**
  INPUT consultants present research results and industry forecasts at your site and relate this information to your specific service markets.
- **INPUT Conference**
  This conference updates INPUT's clients on key industry developments and trends, and provides a forum for discussions with INPUT senior staff and executives of other client firms.

RELATED SERVICES

Other services are also available to meet specific client needs:

- **Market Analysis Program (Europe)**
  Parallels U.S. program in the European market.
- **Systems Integration/Operation Programs (U.S. and Europe)**
  Provide detailed analysis of these two emerging delivery modes.
- **Vendor Analysis Programs (U.S. and Europe)**
  Provide profiles and support data on information services vendors in North America and Europe.
- **Custom Research and Consulting Services**
  INPUT's professional staff is available for a variety of projects, including strategic planning, competitive analysis, specialized market/ product evaluation, and merger/acquisition support.

PROGRAM DESCRIPTION

INDUSTRY/MARKET SECTOR COVERAGE

- Banking and Finance
- Insurance
- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Wholesale Distribution
- Retail Distribution
- Utilities
- Telecommunications
- Technical/Business Services
- Medical
- Education
- Federal Government
- State & Local Government
- Miscellaneous Industries
- Cross-Industry Applications

DELIVERY MODE COVERAGE

- Processing Services
- Network Services
- Software Products
- VAR/Turnkey Systems
- Professional Services/Systems Integration

CLIENT SUPPORT SERVICES

- Research Bulletins
- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Presentation
- Client Conference

- **Consultant Presentations**
  INPUT consultants provide presentations and lead meetings or seminars for strategic planning, business development, etc.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

Market Analysis Program—U.S. (MAP) 1990 Program

Market Analysis Reports*	15 Industry Sector Reports*	Client Services
Processing Services	Banking/Finance	"Hotline" Inquiry Service
Network Services	Discrete Manufacturing	On-Site Presentation (excluding travel)
Software Products	Process Manufacturing	Access to INPUT Information Centers
Professional Services/Systems Integration	Retail Distribution	
VAR/Turnkey Systems	Wholesale Distribution	INPUT Annual Executive Conference (optional; reduced fee)
U.S. Market Forecast Summary	Education	
Periodic Research Bulletins	Medical	
Worldwide Market Forecast Module (optional; additional fee)	Insurance	
	Utilities	
	Federal Government	
	State/Local Government	
	Transportation	
	Telecommunications	
	Service Industry	
	Other Industry-Specific Sector	

* Includes detailed five-year market forecasts

...Delivery mode & vertical market subset program available

Worldwide Information Services Market Forecast Module - (WWMF) 1990 Module

Forecast Series	Client Support
More than 30 Geographic Markets Covered	"Hotline" Inquiry Service
Six Service Delivery Modes Forecasted by Country	Access to INPUT Information Centers (London & California)
Five-Year Forecast (1990-1994)	----------------------
Available on Floppy Disk (D-Base III+)	On-Site Presentation (optional; additional fee)
Directory of Leading Vendors in Major Country Markets	INPUT Annual Executive Conference (optional; reduced fee)

ISP

INPUT®

Information Services Industry

Market Analysis Program—Information Systems Module

Information Systems Module

CRITICAL ROLE OF INFORMATION SYSTEMS

Information systems play a critical role in a company's competitive position, often making the difference between company profit and loss. The Information Systems (IS) organization must respond to this challenge as well as meet demands for quality, fast response, and controlled spending.

Vendors, particularly software suppliers, must understand the factors influencing the IS organization and its interactions with users. The Information Systems Module of INPUT's Market Analysis program provides insight into these areas.

The module is designed and supported by experienced IS executives who also understand the vendor environment.

CLIENT SUPPORT

"Hotline" Inquiry Service
The hotline inquiry service provides support for small-scale research needs (requiring fewer than two hours) and provides clarification/amplification of report and presentation data.

INPUT Client Conference
This conference updates INPUT's clients on key industry developments and trends, and provides a forum for discussions with INPUT senior staff and executives of other client firms. Attendance at this conference is available for a reduced fee for full subscribers.

On-Site Visit Access to INPUT Consultants
For an additional fee, INPUT will provide on-site presentations on current research or perform specific research requests.

REPORT SERIES

1990 Reports

Executive Information Systems
This report analyzes the progress made by users and vendors in the Executive Information Systems (EIS) area. Over the past five years a number of vendors have lead the way using relational data base technology and personal computer interfaces to create a powerful tool for senior management. Using extensive surveys of EIS users and in-depth interviews of the leading vendors, the status of this effort will be presented and guidelines provided for information systems organizations undertaking an EIS program.

Outsourcing Developments
The outsourcing trend is gaining momentum as the new decade begins. In this report, INPUT will look at the factors behind the increased tendency for information systems management to turn to outside sources, not only for software and services, but for systems management as well. The report will draw on research in systems integration and systems operations, and provide a framework for information systems management to consider outsourcing.

Key Trends/Technology for the 1990s
In its annual report on the information systems function, INPUT will look at the progress being made in emerging areas of technology. The movement towards distributed processing, use of servers and LANs, and use of image processing are among the topics planned for this report.

1989 Reports

Information Systems Management in the 1990s
This report analyzes technological development, business factors, and other issues that will significantly affect Information Systems management in the 1990s. Changes in expenditure patterns and organizational responsibilities are examined, particularly with reference to the management of technology deployment.

The impact on vendor marketing and sales strategies is evaluated. Recommendations for action are presented, particularly with reference to organizational and strategic responses.

Data Base Systems Developments
Experiences with, and plans for the use of relational and distributed DBMS are evaluated in terms of applications use, functions affected, organization units using them, and results of their use. The impact on software-based vendors of all types is examined. Recommendations for the effective use of such products are presented.

JAPAN

INPUT®

If You Need Answers to Questions Like "How Big Is the Software Market in Japan?"...

- ▲ Worldwide Market Figures and Forecasts
- ▲ Data By Country and By Region
- ▲ Analysis of Forces Driving or Inhibiting Market Growth
- ▲ Hard Data on Economic and Political Climates
- ▲ Strategic Recommendations for Worldwide Marketers

...INPUT's *Worldwide Market Forecast, 1989* -

- How big is the worldwide market for information services?
- How fast is it growing overall?
- Where are the best opportunities for businesses providing different kinds of products and services?

INPUT's newly released *Worldwide Market Forecast, 1989-1994*, is the result of a major, multiclient research project designed and implemented specifically to give you the answers to these kinds of questions.

Worldwide Market Forecast 1989-1994		
Regional Summaries		
• Asia/Pacific, Latin America, Middle East/Africa - Regional Economic/Political Setting - Environmental Factors - Regional Services Forecast - Market Entry/Expansion Considerations • Europe, North America - Regional Economic/Political Setting - Regional Services Forecast - Competitive Environment		
National Service Profiles		
• Argentina	• Australia	• Austria
• Belgium	• Brazil	• Canada
• Denmark	• E. Europe	• Finland
• France	• Hong Kong	• Italy
• India	• Japan	• S. Korea
• Mexico	• Netherlands	• New Zealand
• Norway	• Other Asia	• Other W. Euro.
• Singapore	• Spain	• Sweden
• Switzerland	• Taiwan	• United Kingdom
• United States	• Venezuela	• W. Germany

Worldwide market data is notoriously difficult to get. The geography, language barriers, problems with consistent definitions, communications breakdowns, cultural differences, and other reasons all make reliable worldwide market information rare.

And extremely valuable.

INPUT has developed a methodology that has allowed us to circumvent these problems. The new report, based on the study, contains information from more than 1,100 interviews, all of them conducted in the native language of the interviewees, concerning market data, trends, and conditions in thirty countries and geographic regions around the world. Some examples:

- The trend toward industry-specific and country-specific software is now driving much of the market for minicomputer and microcomputer software products. INPUT's analysis shows how you can turn this trend to your advantage.
- Developing countries represent significant market opportunities for companies that can make long-term commitments. INPUT tells you why.
- Cultural differences blunt the effectiveness of many companies' promotion and pricing policies. INPUT gives examples of how greater creativity can yield tremendous dividends.
- Technocentricity and cost consciousness may be valuable in the U.S. markets. But how about in a market where personal relationships can be as important as functionality or price? INPUT outlines some ways to shape sales strategies to local market characteristics.

And more...

INPUT®

1994, Was Written for You!

The report, based on the study, focuses INPUT's research expertise onto user requirements for information services in seven delivery modes:

- Processing Services
- Network Services
- Applications Software
- Systems Software
- Turnkey Systems
- Systems Integration
- Professional Services

Using this information, market and strategic planners can derive valuable insights into market sizes and dynamics for various product types.

The worldwide market forecast report also cuts these data by five major geographic regions:

- North America
- Europe (Western and Eastern)
- Asia/Pacific
- Latin America
- Middle East/Africa

Using INPUT's report, marketers can determine the relative size and growth rates of any of the above delivery modes in all of these regions. This gives them a powerful and convenient tool for taking the pulse of any market of interest.

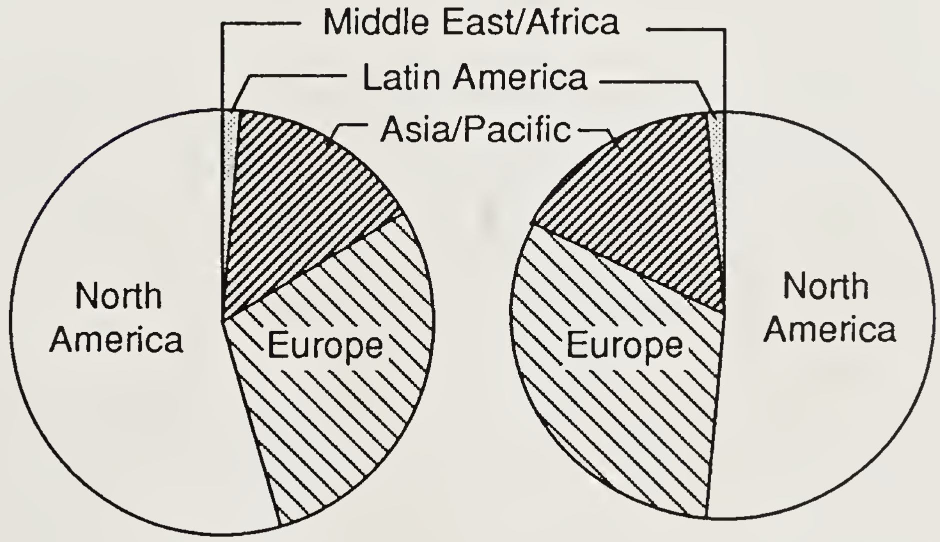
In addition, INPUT provides a profile for each of the geographic areas analyzed that considers significant factors that could affect the market for information services:

- The Economic and Political Climate
- Key Technology Trends
- Forces Encouraging the Growth of Information Systems
- Forces Inhibiting the Growth of Information Systems
- Profiles of Major Service Providers
- An Analysis of Factors Affecting Market Entry or Expansion

With the worldwide market for the information systems and services headed for $400 billion by 1994, the value of targeted, firsthand market intelligence is clear. And that's exactly what INPUT's *Worldwide Market Forecast, 1989-1994*, gives you.

So use the enclosed Order Form to get your copy today! It's a small investment in a powerful competitive tool.

Worldwide Market Distribution 1989 vs. 1994



Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

If You Need Answers to Questions Like "How Big Is the Software Market in Japan?"...

- ▲ Worldwide Market Figures and Forecasts
- ▲ Data By Country and By Region
- ▲ Analysis of Forces Driving or Inhibiting Market Growth
- ▲ Hard Data on Economic and Political Climates
- ▲ Strategic Recommendations for Worldwide Marketers

...INPUT's *Worldwide Market Forecast, 1989*

- How big is the worldwide market for information services?
- How fast is it growing overall?
- Where are the best opportunities for businesses providing different kinds of products and services?

INPUT's newly released *Worldwide Market Forecast, 1989-1994*, is the result of a major, multiclient research project designed and implemented specifically to give you the answers to these kinds of questions.

Worldwide Market Forecast 1989-1994		
Regional Summaries		
• Asia/Pacific, Latin America, Middle East/Africa - Regional Economic/Political Setting - Environmental Factors - Regional Services Forecast - Market Entry/Expansion Considerations • Europe, North America - Regional Economic/Political Setting - Regional Services Forecast - Competitive Environment		
National Service Profiles		
• Argentina	• Australia	• Austria
• Belgium	• Brazil	• Canada
• Denmark	• E. Europe	• Finland
• France	• Hong Kong	• Italy
• India	• Japan	• S. Korea
• Mexico	• Netherlands	• New Zealand
• Norway	• Other Asia	• Other W. Euro.
• Singapore	• Spain	• Sweden
• Switzerland	• Taiwan	• United Kingdom
• United States	• Venezuela	• W. Germany

Worldwide market data is notoriously difficult to get. The geography, language barriers, problems with consistent definitions, communications breakdowns, cultural differences, and other reasons all make reliable worldwide market information rare.

And extremely valuable.

INPUT has developed a methodology that has allowed us to circumvent these problems. The new report, based on the study, contains information from more than 1,100 interviews, all of them conducted in the native language of the interviewees, concerning market data, trends, and conditions in thirty countries and geographic regions around the world. Some examples:

- The trend toward industry-specific and country-specific software is now driving much of the market for minicomputer and microcomputer software products. INPUT's analysis shows how you can turn this trend to your advantage.
- Developing countries represent significant market opportunities for companies that can make long-term commitments. INPUT tells you why.
- Cultural differences blunt the effectiveness of many companies' promotion and pricing policies. INPUT gives examples of how greater creativity can yield tremendous dividends.
- Technocentricity and cost consciousness may be valuable in the U.S. markets. But how about in a market where personal relationships can be as important as functionality or price? INPUT outlines some ways to shape sales strategies to local market characteristics.

And more...

1994, Was Written for You!

The report, based on the study, focuses INPUT's research expertise onto user requirements for information services in seven delivery modes:

- Processing Services
- Network Services
- Applications Software
- Systems Software
- Turnkey Systems
- Systems Integration
- Professional Services

Using this information, market and strategic planners can derive valuable insights into market sizes and dynamics for various product types.

The worldwide market forecast report also cuts these data by five major geographic regions:

- North America
- Europe (Western and Eastern)
- Asia/Pacific
- Latin America
- Middle East/Africa

Using INPUT's report, marketers can determine the relative size and growth rates of any of the above delivery modes in all of these regions. This gives them a powerful and convenient tool for taking the pulse of any market of interest.

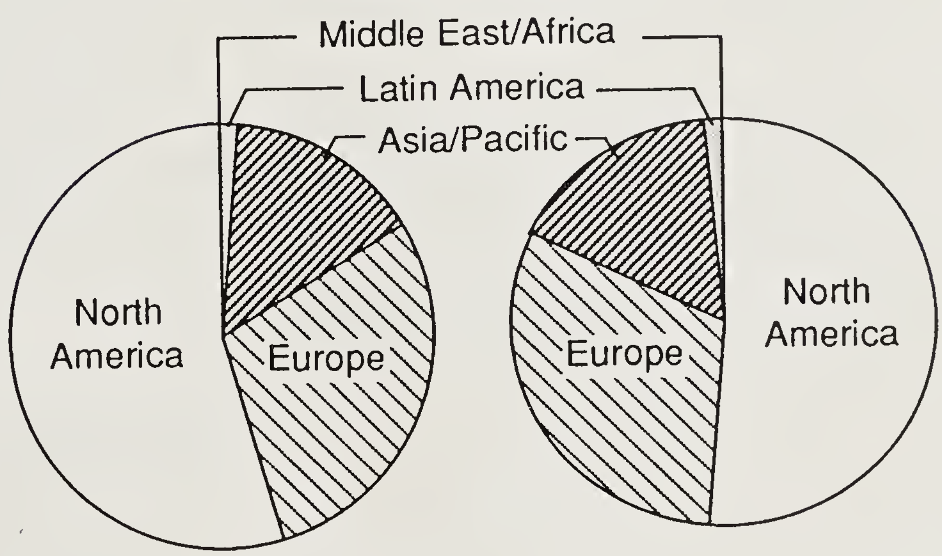
In addition, INPUT provides a profile for each of the geographic areas analyzed that considers significant factors that could affect the market for information services:

- The Economic and Political Climate
- Key Technology Trends
- Forces Encouraging the Growth of Information Systems
- Forces Inhibiting the Growth of Information Systems
- Profiles of Major Service Providers
- An Analysis of Factors Affecting Market Entry or Expansion

With the worldwide market for the information systems and services headed for $400 billion by 1994, the value of targeted, firsthand market intelligence is clear. And that's exactly what INPUT's *Worldwide Market Forecast, 1989-1994,* gives you.

So use the enclosed Order Form to get your copy today! It's a small investment in a powerful competitive tool.

Worldwide Market Distribution 1989 vs. 1994



Call, fax, or mail your order to INPUT
to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407   Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630   Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870   Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113   Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531   Fax (03) 864-4114

Multiclient

INPUT®

Information Services Industry Canadian Information Services Market Forecast, 1990-1995

▲ A Multiclient Study

▲ Offered Exclusively by INPUT

Canadian Information Services Market Forecast, 1990-1995

Need for Information

As a market for information services, Canada is unique. Geographically the second largest country in the world, Canada's population is only 10% that of the U.S. Seventy-four percent of the largest companies and more than 85% of the primary markets are concentrated in a small geographic area.

Starting from a small base, Canada's information services market is projected to grow significantly. Previous INPUT research suggests a growth rate averaging 20% per year. But this could change.

With the U.S.-Canada free trade agreement in force, an increasing number of U.S. companies are seeking to increase their presence in Canada. At the same time, Canadian companies sometimes indicate a preference for dealing with Canadian companies.

Instabilities resulting from the Canada/Quebec constitutional situation could affect growth of the market, at a time when national investment is being made to increase Canada's position in the world's economy.

Numerous organizations have indicated a need for information about trends in the Canadian information services market. INPUT's research will analyze the market, providing a forecast for the five-year period from 1990-1995. As part of the study, INPUT will analyze factors that could drive the market higher or inhibit growth. The report will also identify major technology trends.

Service Delivery Modes

- Processing Services
- Network Services
- Software Products
- Turnkey Systems
- Systems Integration
- Professional Services
- Systems Operations

Methodology

INPUT will conduct in-depth interviews of both vendors and buyers of information services.

- These surveys will provide vital information on user expenditures, planned growth rates by specific service delivery modes (e.g., processing services, professional services, etc.), market driving forces and issues.
- Other sources of information will be utilized to supplement the primary research. Trade associations, government agencies, industry consultants and reliable trade and business publications will be used as sources to build the Canadian forecast data base.

Scope of Study

INPUT's study of the Canadian information services market will include an analysis of seven (7) delivery modes and fifteen (15) industry segments.

The report will provide insight into technology status, driving forces, trends, issues and overall business conditions.

Industry Segments

- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Utilities
- Communications
- Retail
- Wholesale
- Banking/Finance
- Insurance
- Medical
- Services
- Education
- Federal Government
- Provincial/Local Government
- Cross Industry

- Proven quality control methods will be employed to ensure the highest quality of information.

INPUT's Credentials

INPUT has...

- The strongest information services market analysis team in the world
- Conducted research in all major worldwide marketplaces
- A ten-year history of producing high-quality U.S. and Western European market forecasts and analyses using a standardized and proven set of market definitions
- Developed a proven research and forecasting methodology enabling timely forecast and analysis turnaround.

...dy Audience

- Information services vendors who are considering entering the Canadian information services market
- Established Canadian vendors wishing to enter new markets or to accurately measure market shares of providers in the Canadian market.
- Planners who need to understand the scope of specific market opportunities within specific delivery modes and industry segments.

Study Timing

- Research/analysis will be conducted during October and November.
- Results are planned for presentation at a subscriber seminar in December in Canada. The specific location of the seminar will be determined later.
- The final report will be delivered to sponsoring companies 30 days after the subscriber seminar.

Schedule of Fees (U.S. Funds)

We offer this reort at the fee of $10,500.

PROJECT DELIVERABLES
Market Forecast Report
• Seven service delivery modes • Five-year forecast, 1990-1995 • Fifteen vertical market segments • Key technology trends • Industry leaders
Presentation of Findings
• Presentation in Canada
Forecast on Floppy Disk
• Lotus 1-2-3

Call, fax, or mail your order to INPUT
to any office listed on the back of this brochure

INPUT Canadian Agent:
Mr. Ross Hutchison
Ross Hutchison & Associates, Inc.
174 Claxton Drive
Oakville, Ontario L6J [illegible]
Canada
Tel. (416) 844-4069
Fax (416) 844-4071

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen
West Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

Information Services Industry Canadian Information Services Market Forecast, 1990-1995

- ▲ A Multiclient Study
- ▲ Offered Exclusively by INPUT
- ▲ Project Launch—July 1990

Canadian Information Services Market Forecast, 1990-1995

Need for Information

As a market for information services, Canada is unique. Geographically the second largest country in the world, Canada's population is only 10% that of the U.S. Seventy-four percent of the largest companies and more than 85% of the primary markets are concentrated in a small geographic area.

Starting from a small base, Canada's information services market is projected to grow significantly. Previous INPUT research suggests a growth rate averaging 20% per year. But this could change.

With the U.S.-Canada free trade agreement in force, an increasing number of U.S. companies are seeking to increase their presence in Canada. At the same time, Canadian companies sometimes indicate a preference for dealing with Canadian companies.

Instabilities resulting from the Canada/Quebec constitutional situation could affect growth of the market, at a time when national investment is being made to increase Canada's position in the world's economy.

Numerous organizations have indicated a need for information about trends in the Canadian information services market. INPUT's research will analyze the market, providing a forecast for the five-year period from 1990-1995. As part of the study, INPUT will analyze factors that could drive the market higher or inhibit growth. The report will also identify major technology trends.

Service Delivery Modes

- Processing Services
- Network Services
- Software Products
- Turnkey Systems
- Systems Integration
- Professional Services
- Systems Operations

Methodology

INPUT will conduct in-depth interviews of both vendors and buyers of information services.

- These surveys will provide vital information on user expenditures, planned growth rates by specific service delivery modes (e.g., processing services, professional services, etc.), market driving forces and issues.
- Other sources of information will be utilized to supplement the primary research. Trade associations, government agencies, industry consultants and reliable trade and business publications will be used as sources to build the Canadian forecast data base.

Scope of Study

INPUT's study of the Canadian information services market will include an analysis of seven (7) delivery modes and fifteen (15) industry segments.

The report will provide insight into technology status, driving forces, trends, issues and overall business conditions.

Industry Segments

- Discrete Manufacturing
- Process Manufacturing
- Transportation
- Utilities
- Communications
- Retail
- Wholesale
- Banking/Finance
- Insurance
- Medical
- Services
- Education
- Federal Government
- Provincial/Local Government
- Cross Industry

INPUT
MULTICLIENT STUDY
Canadian Information Services Market, 1990-1995

SECTION ONE:
My Order

To: Dennis Wayson, INPUT, 1280 Villa Street, Mountain View, CA 94041-1194, U.S.A., (415) 961-3300
Or: Ross Hutchison, Ross Hutchison & Associates, Inc., 174 Claxton Drive, Oakville, Ontario L6J 4N9 Canada, (416) 844-4069.

Please enter our order for INPUT's Multiclient Study at the fee of $ ____________________.

SECTION TWO:
Terms of Payment and Order Acceptance

Order and payment must be received by INPUT on or before August 15, 1990 in order for the order to be accepted and study commenced.

SECTION THREE:
Conditions Agreement

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

SECTION FOUR:
Authorization

Authorized By:

____
Client Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

AMMKT CAN 7/10/90

- Proven quality control methods will be employed to ensure the highest quality of information.

INPUT's Credentials

INPUT has...

- The strongest information services market analysis team in the world
- Conducted research in all major worldwide marketplaces
- A ten-year history of producing high-quality U.S. and Western European market forecasts and analyses using a standardized and proven set of market definitions
- Developed a proven research and forecasting methodology enabling timely forecast and analysis turnaround.

Study Audience

- Information services vendors who are considering entering the Canadian information services market
- Established Canadian vendors wishing to enter new markets or to accurately measure market shares of providers in the Canadian market.
- Planners who need to understand the scope of specific market opportunities within specific delivery modes and industry segments.

Study Timing

- Study will commence upon full sponsorship; expected commencement date: July 1990.
- Research/analysis will be conducted during July, August and September.
- Results are planned for presentation at a subscriber seminar in October in Canada. The specific location of the seminar will be determined later.
- The final report will be delivered to sponsoring companies 30 days after the subscriber seminar.

Schedule of Fees (U.S. Funds)

$9,500 with order and payment received by INPUT on or before August 1, 1990.

$10,500 with order and payment received by INPUT after August 1, 1990.

PROJECT DELIVERABLES
Market Forecast Report
• Seven service delivery modes • Five-year forecast, 1990-1995 • Fifteen vertical market segments • Key technology trends • Industry leaders
Presentation of Findings
• Presentation in Canada
Forecast on Floppy Disk
• Lotus 1-2-3

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

INPUT Canadian Agent:
Mr. Ross Hutchison
Ross Hutchison & Associates, Inc.
174 Claxton Drive
Oakville, Ontario L6J 4N
Canada
(416) 844-4069
Fax (416) 845-0611

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco Bay Area
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

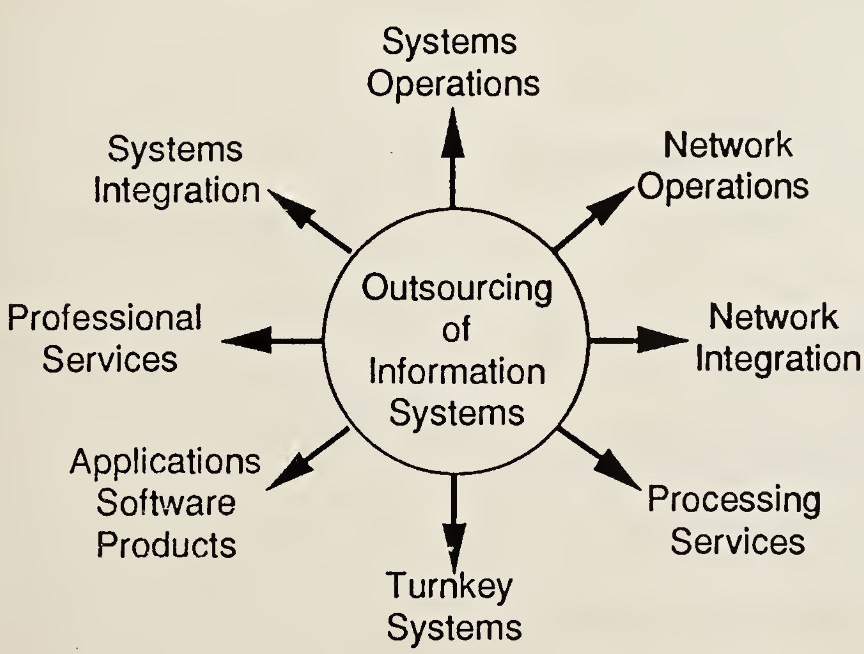
FISSP

INPUT®

The "Outsourcing" Revolution!

- What Is Outsourcing?
- Does It Make Sense?
- Can I Be in the Forefront?

Join industry leaders, outsourcing experts, and INPUT's analysts. Discuss the potential revolution of the 1990s in the development and operation of computer/communications systems.



INPUT Conference
June 7 & 8, 1990
Omni Shoreham Hotel
Washington, D.C.

CALL INPUT
(415) 961-3300

Learn about the "Outsourcing" Revolution

Critical Issues to be Addressed Include:

- Service Options:
  - What is outsourcing?
- Strategic Objectives:
  - What are the short-term versus long-term benefits?
  - How can outsourcing create competitive advantage?
  - Can you achieve the same benefits yourself?
  - What is the experience of your peers?
- Financial Considerations:
  - What are the financial costs and benefits?
  - How flexible is your budget with outsourcing?
  - Have savings claims been exaggerated?
  - What could you save through outsourcing?
- Implementation:
  - Who takes responsibility in outsourcing?
  - What is the impact on organizations and people?
  - How do you manage change?
  - What role should consultants play?

Who Should Attend:

- CEOs
- CFOs
- CIOs
- Planning Executives
- Software and Services Executives
- Executives with Information Systems Customers and Vendors

MARKEN
COMMUNICATIONS
1245 Oakmead Parkway
Sunnyvale, CA 94086
Phone 408 738-1115
FAX 408 738-1060

News Release

Agency Contact: Andy Marken
Office: (408) 738-1115
Home: (408) 732-9589

Client Contact: Peter A. Cunningham
Dennis Wayson
(415) 961-3300

For: Input Corporation
1280 Villa Street
Mountain View, CA 94041

FOR IMMEDIATE RELEASE

CONFERENCE PROBES THE OUTSOURCING REVOLUTION

MOUNTAIN VIEW, CA (May 4, 1990) -- The "Outsourcing Revolution" Conference, which will be held in Washington, D.C. on June 7 and 8, will feature industry leaders and users who are shaping information management for the ensuing decade of global competition.

Sponsored by Input, a market research firm, the conference will address outsourcing, a movement in which even the largest corporations are turning over the keys to their information systems to outside contractors.

"Outsourcing will be as important as the break up of the Bell System was to major users and providers of data processing and telecommunications services," said Peter Cunningham, chairman and CEO of Input. "We've been monitoring outsourcing closely, and we expect it to revolutionize preconceptions of information ownership. Over the next few years, firms will increasingly turn to outsourcing as a way to reduce their spiraling information processing costs and increase the performance of the department.

Input studies have shown that as economic pressures force corporations to concentrate on lines of business, outsourcing will overcome the natural inertia for users to maintain in-house processing and telecommunications.

. . .more

Other driving forces for outsourcing include stricter cost control, demand for expertise, systems integration, and the overall contracting of outside services and disaster recovery. It is estimated that by 1992, 20 percent of corporate MIS activities will be outsourced and performed by outside contract firms.

As a result, Input forecasts that the market for information processing services will increase from its 1988 figure of $18.9 billion to $32.9 billion in 1993, generating a compound annual growth rate of 12 percent.

The "Outsourcing Revolution" Conference will include speakers who are front runners in this burgeoning field. Among them are Gary Fernandes, senior vice president, Electronic Data Systems; John Oltman, partner, Anderson Consulting; Tom Esposito, vice president, IBM; and John L. Cudworth, vice president, Litton Computer Services.

Point-counterpoint sessions will also be held between users and outsourcing providers to give attendees a balanced perspective of the issue. Sessions will be moderated by Input analysts.

Input has been sponsoring executive conferences for the past twelve years. The combination of computer industry professionals, objective research and strong customer interaction has produced a conference environment for the presentation of new ideas, and the identification of trends that have actually come to pass.

For registration information on the June 7 and 8 Input Outsourcing of Information Systems Conference, which will be held at the Omni Shoreham Hotel in Washington, D.C., call or write Input, 1280 Villa Street, Mountain View, CA 94041; (415) 961-3300.

# # #

05INP01.NR

INPUT®

Open, direct, and in-depth interaction with experts, vendors, and your peers—INPUT provides the essential environment to help you make decisions: should you contract your information services to outside vendors?

The conference will begin at 8:00 a.m., with two days of panel sessions, group discussions, lectures, question-and-answer formats, and informal interaction with experts and peers. A 5:30 p.m. reception will end the first day. Day two ends at 3:30 p.m.

Get the Information You Need On:

- **Information Systems Outsourcing**
  Our keynote topic will tell you:
  - What is it?
  - Why is it becoming a major factor?

- **Systems Development Outsourcing**
  - Systems Integration Outsourcing
  - Role of Consultants in Outsourcing
  - Role of Professional Services in an Outsourcing Program
  - Outsourcing Support and Maintenance Operations
  - Federal Government Outsourcing

- **Systems Operations Outsourcing**
  - Outsourcing of Applications Operations
  - Outsourcing of Systems Operations
  - User Requirements in an Outsourcing Environment
  - Outsourcing Impact on People
  - International Network Outsourcing

- **Explored from the Viewpoint of:**
  - Industry Trends and Forecasts
  - Trends in Cost Factors
  - People and Skills Issues
  - Planning an Outsourcing Strategy

Sessions will be moderated by INPUT analysts:

- Peter Cunningham, Chairman/CEO
- John Frank, President (INPUT INC.)
- R. Dennis Wayson, Vice President
- Thomas O'Flaherty, Vice President
- Norman Litell, Director, Market Analysis Program
- Doug Wilder, Director, Systems Integration Program
- Alex Graham, Principal Consultant

Speakers Include the Following Industry Leaders and Outsourcing Experts:

(partial listing)

★ **Mel Bergstein**, Senior Vice President, CSC Partners

★ **Dave N. Campbell**, Chairman/CEO, Computer Task Group

★ **John L. Cudworth**, Vice President, Litton Computer Services

★ **Peter A. Cunningham**, Chairman/CEO, INPUT

★ **Tom Esposito**, Vice President, IBM Corporation

★ **Gary Fernandes**, Senior Vice President, Electronic Data Systems

★ **Dr. Randall Gannaway**, Director, Corporate Data Center, FMC Corporation

★ **Thomas Solomon**, Vice President, Genix Corporation

★ **Vic Millar**, Chairman, PSF Management International

★ **John Oltman**, Partner, Andersen Consulting

★ **William E. Perren**, President, Development and Operations, INFONET

★ **John Steuri**, Chairman/President, Systematics

Limited attendance—please confirm early to avoid disappointment

CALL INPUT
(415) 961-3300

INPUT®

Open, direct, and in-depth interaction with experts, vendors, and your peers—INPUT provides the essential environment to help you make decisions: should you contract your information services to outside vendors?

The conference will begin at 8:00 a.m., with two days of panel sessions, group discussions, lectures, question-and-answer formats, and informal interaction with experts and peers. A 5:30 p.m. reception will end the first day. Day two ends at 3:30 p.m.

Get the Information You Need On:

- **Information Systems Outsourcing**
  Our keynote topic will tell you:
  - What is it?
  - Why is it becoming a major factor?

- **Systems Development Outsourcing**
  - Systems Integration Outsourcing
  - Role of Consultants in Outsourcing
  - Role of Professional Services in an Outsourcing Program
  - Outsourcing Support and Maintenance Operations
  - Federal Government Outsourcing

- **Systems Operations Outsourcing**
  - Outsourcing of Applications Operations
  - Outsourcing of Systems Operations
  - User Requirements in an Outsourcing Environment
  - Outsourcing Impact on People
  - International Network Outsourcing

- **Explored from the Viewpoint of:**
  - Industry Trends and Forecasts
  - Trends in Cost Factors
  - People and Skills Issues
  - Planning an Outsourcing Strategy

Sessions will be moderated by INPUT analysts:

- Peter Cunningham, Chairman/CEO
- John Frank, President (INPUT INC.)
- R. Dennis Wayson, Vice President
- Thomas O'Flaherty, Vice President
- Norman Litell, Director, Market Analysis Program
- Doug Wilder, Director, Systems Integration Program
- Alex Graham, Principal Consultant

Speakers Include the Following Industry Leaders and Outsourcing Experts:

(partial listing)

★ **Mel Bergstein**, Senior Vice President, CSC Partners

★ **Dave N. Campbell**, Chairman/CEO, Computer Task Group

★ **John L. Cudworth**, Vice President, Litton Computer Services

★ **Peter A. Cunningham**, Chairman/CEO, INPUT

★ **Tom Esposito**, Vice President, IBM Corporation

★ **Gary Fernandes**, Senior Vice President, Electronic Data Systems

★ **Dr. Randall Gannaway**, Director, Corporate Data Center, FMC Corporation

★ **Thomas Solomon**, Vice President, Genix Corporation

★ **Vic Millar**, Chairman, PSF Management International

★ **John Oltman**, Partner, Andersen Consulting

★ **William E. Perren**, President, Development and Operations, INFONET

★ **John Steuri**, Chairman/President, Systematics

Limited attendance—please confirm early to avoid disappointment

CALL INPUT
(415) 961-3300

OUTSOURCING OF INFORMATION SYSTEMS
June 7 & 8, 1990, Omni Shoreham Hotel, Washington, D.C.

CONFERENCE REGISTRATION

Conference fees:
Subscribers to INPUT's Market Analysis Program may attend at the fee of $495 per person.

- First attendee from a non-subscribing company...$995
- All additional attendees...$495

PAYMENT AND CANCELLATION POLICY
Cancellations must be in writing and are subject to a 25% cancellation fee if received after May 23. INPUT will consider purchase order numbers or company checks as proper reservations. We also accept American Express. INPUT reserves the right to make changes to this conference without notice.

FLIGHT ARRANGEMENTS

In making flight arrangements, please be aware that we have a program with American Airlines allowing you the following discounts:

- 40% off of full coach fare
- 5% off any already discounted fare

If interested, please place your reservation under Star #S0360G6 and specify dates of travel. These rates are available through Dulles, National and Baltimore/Washington airports.

ACCOMMODATIONS

Washington's famous landmark hotel, the Omni Shoreham, beautifully restored to the grand style of days gone by and uniquely located on 11 tranquil acres in Rock Creek Park in the heart of Washington, D.C., just one block from Woodley Park Metro Station, minutes from the Smithsonian Institute, museums, the Capitol, and walking distance from the National Zoo.

Hotel reservations may be made by calling the Omni Shoreham at (202) 234-0700. Be sure to ask for the INPUT Conference special rate. Available rooms may be taken quickly, so please contact the hotel promptly.

Yes! Please confirm my registration for the
INPUT Conference, June 7 & 8, 1990
Washington, D.C.

Company ______________________

Name ______________________

Title ______________________

Address ______________________

City ______ State ______ Zip ______

Phone ______________________

Signature ______________________

- ☐ I am registering as an INPUT subscriber. Bill my company $495.
- ☐ I am registering for this conference. Bill my company $995.
- ☐ I am registering as an additional attendee. Bill my company $495.

P.O #______________

- ☐ Check enclosed for $______________
- ☐ Charge $______________ to my American Express card

#______________

Expiration date ______________

____
Signature

- ☐ Have a representative call me.

INPUT 1280 Villa Street •Mountain View, CA 94041 • 415-961-3300 •Fax 415-961-3966

JJJJ 4/90

INPUT's 1991
Federal Information Systems and Services Program

Yes!
Please enter my order as described:

Subscription to INPUT's Federal Information Systems and Services Program:

- ☐ $25,000 if authorized *by* December 31, 1990.
- ☐ $26,000 if authorized *after* December 31, 1990.

- ☐ Market Analysis Reports only at the fee of $15,000
- ☐ Procurement Analysis Reports only at the fee of $15,000
- ☐ Automated Procurement Analysis Reports *with* the Federal Information Systems and Services Program *or* the Procurement Analysis Reports at the additional fee of $2,000

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning ____________. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

- ☐ Enclosed is my check in the amount of $________________.
- ☐ Bill my company on purchase order number ____________ in the amount of $________________.

Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
Tel. (415) 961-3300
Fax (415) 961-3966

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

Accepted By INPUT:

Signature

Name

Title

Date

VAP

INPUT®

Information Services Industry

Vendor Analysis Program—U.S.

Vendor Analysis Program—U.S.

GUIDE TO A FRAGMENTED INDUSTRY

The Information Services industry is highly fragmented. It is also intensely competitive and has a rapidly changing market structure. Participating in this industry requires access to information and knowledge on vendors and their characteristics. Through the Vendor Analysis Program, clients are able to satisfy this need.

The Vendor Analysis Program is based on INPUT's 15 years of tracking vendors in the information services industry. It provides access to files on thousands of vendors and detailed profiles on hundreds of the most important companies.

Information from the Vendor Analysis Program is critical for competitive analysis and purchase, acquisition, and alliance decisions.

VENDOR PROFILES

Profiles of public and private information services vendors are the cornerstone of the Vendor Analysis Program. Profiles focus on 'hidden' vendors: divisions of large companies, private companies, and small fast-growing vendors. They include:

- General information (company name, address, telephone, chief executive's name, public/private, employees, revenues)
- Summary of company origin, merger/acquisition history, events impacting company growth
- Financial data
- Revenue distribution by delivery mode
- Employee and organization data
- Key products and services
- Industry markets served
- Geographic markets served

TYPES OF VENDOR COVERED

- Professional Services
  - Consulting
  - Education/Training
  - Software Development
  - Systems Operations (FM)
- Systems Integration
  - Commercial
  - Federal Government
- Applications Software Products
  - Vertical Industry Specific
  - Cross-Industry
- Systems Software Products
  - Systems Control Software
  - Data Center Management Software
  - Applications Development Tools (CASE)
- Processing Services
  - Transaction Services
  - Utility Services
  - Systems Operations (FM)
  - Other Processing Services
- Network Services
  - VANs
  - EDI
  - Electronic Mail
  - Electronic Information (Data Base) Services
- Telecommunications Services
- Turnkey Systems
  - Vertical Industry Specific
  - Cross-Industry
- Third-Party Maintenance

INPUT®

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of profile data.

Access to Files on 4,000 Vendors
INPUT maintains files on over 4,000 information services vendors. Access is through the "Hotline" or by visiting the Mountain View information center.

Client Conference
The conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as to meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- The Vendor Analysis Program—Europe provides company profiles and support data on European information services vendors.
- Market Analysis Program analyzes and forecasts the computer/communications software and services markets in the U.S. and Western Europe.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

VENDOR PROFILES

- Information Services Vendors
  - Public Companies
  - Private Companies
  - Divisions of Large Companies
- U.S. and Canada
- Company Background
- Products and Services
- Revenue and Employee Data

CLIENT SUPPORT

- Access to INPUT Consultants
- Access to Files on 4,000 Vendors
- "Hotline" Inquiry Service
- Client Conference

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

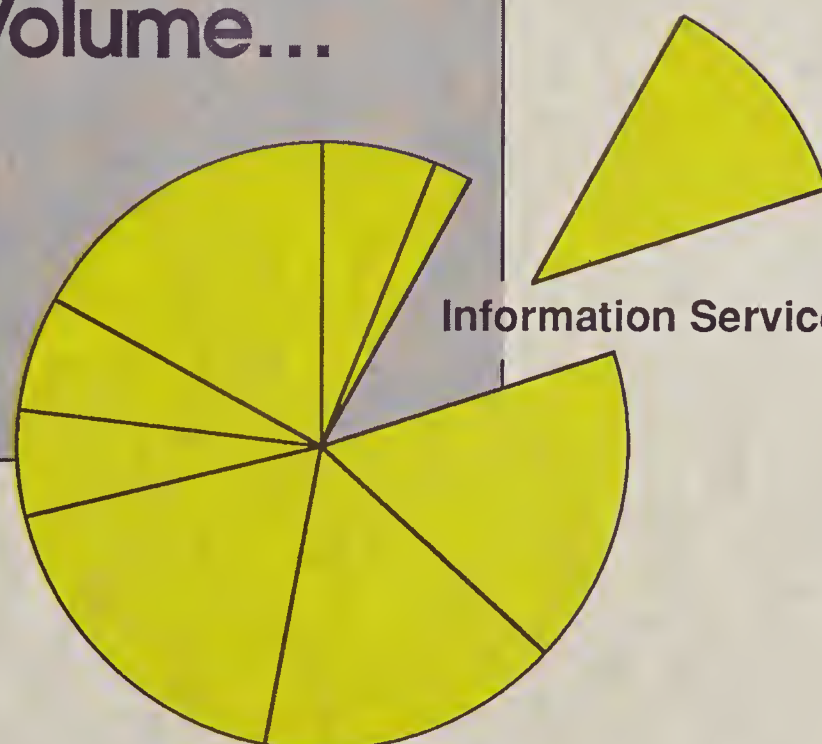
Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

Informed Analysis of the Information Services Industry

Distilled into a Single Volume…



FOURTEENTH ANNUAL STUDY

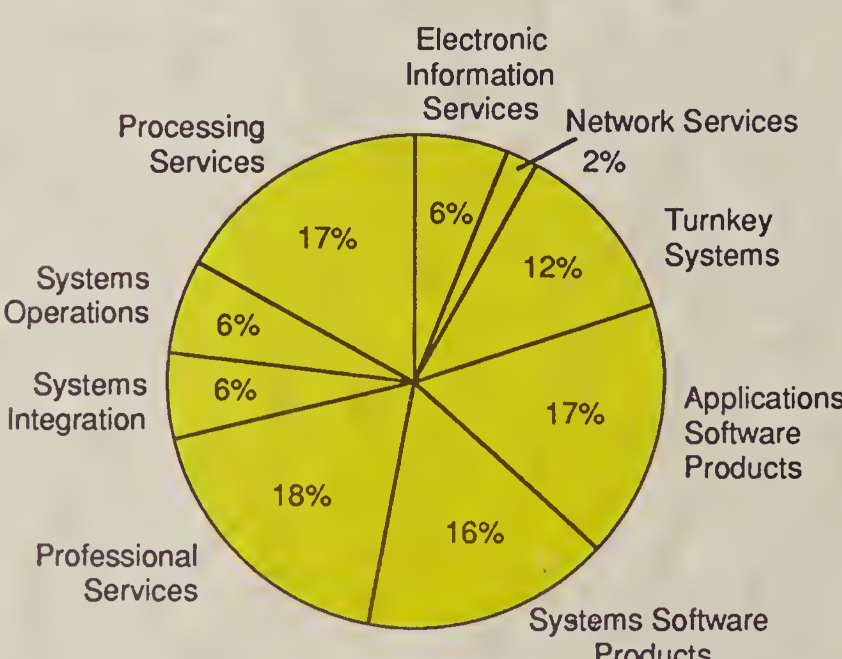
...The All-New 1990 Information Services

...It is the landmark report on information services, the touchstone against which all other analyses are measured. Its publication is eagerly awaited by marketers, strategic planners, chief executives, analysts, and members of the press who have to know what's going on in our business.

And it is soon to be released. The *1990 Information Services Industry Report* from INPUT is now available. Containing the most useful analysis of this ever-changing market that information professionals can buy, the 1990 report follows the path pioneered by earlier editions:

- Only the best market intelligence is used, data that is cross-correlated with independent sources and that is consistent with overall market figures when the various segments are totaled. Each individual element makes sense. And so does the larger picture composed of those elements. Only INPUT offers this consistency throughout its analyses from the smallest submarket to the entire industry.

Information Services Industry Market by Delivery Mode, 1989



Total Size: $92 Billion

Source: INPUT

THE DOLLARS AND MARKET SHARES attributable to the various submodes in the Information Services Industry Market. This is the kind of fine-grained analysis that INPUT offers industry professionals.

- Only the most informative market divisions are used to make sense of recent market changes, giving you insights into the overall growth and transformation of the industry.
- Only the analyses of the best minds in the research community are used, men and women with decades of experience as users and vendors, buyers and sellers, people who know first-hand the forces that shape these markets.

These are the elements that make up the *1990 Information Industry Report* from INPUT.

And if you act before October 31, 1990, you'll pay $150 less than the regular list price for large-scale analysis you can get nowhere else—a savings of 15%!

But what can the report offer you?

Unparalleled Information Concentration

The *1990 Information Services Industry Report* gives vendors and users an accurate summation of the large-scale trends in this industry today and for the next five years, including: market sizes and growth rates; detailed case studies of companies that have succeeded in all of the major delivery modes; major forces shaping market-segment growth; competitive analysis for each delivery mode, including revenue and net income analyses of companies successful in each mode; and more.

The report is designed from the ground up to be a single-volume resource you can use to answer the questions that will affect your success in the market as a whole:

- Where are the biggest growth opportunities in the industry and what are the forces driving them?
- How long-term are these forces and the opportunities they create? How are they likely to change?
- How are the growth rates for various market segments changing over time?
- How many companies are there in each segment? What are the implications for the competitive environment?
- How have revenue growth and net income growth compared over the last five years for the industry as a whole?

ndustry Report!

- What impacts will the emergence of truly global information services companies have in the 1990s?

Only INPUT's *1990 Information Services Industry Report* gives you answers to these large-scale questions that can be trusted in the context of our analyses of sectors, markets, and submarkets. All of the numbers agree. And all are updated every year, so that you get the best and most accurate picture available of what's happening out there.

INPUT's report also helps you answer questions at a much finer level of granularity. We analyze in detail the following delivery modes: Systems Software, Applications Software, Professional Services, Processing Services, Electronic Information Services, Turnkey Systems, Systems Integration, Systems Operations, and Network Services.

Then we address the questions about these delivery modes whose answers can affect the tactical and operational decisions you have to make every day:

- What are the potential impacts of new user strategies like outsourcing?
- ow can you use the demand for outsourcing to forge long-term relationships with users in the areas of applications management, applications maintenance, and transition management?
- How will the actions of key vendors like IBM, EDS, and Andersen Consulting change the competitive environment in systems integration and systems operations?
- How fast is each delivery mode growing? What share of the total market is accounted for by each mode?
- How are increasing complexity, standards, workstation power, and the demand for custom solutions affecting the applications software mode?
- How can systems integrators respond to increasing systems complexity, strategic alliances, large-vendor competition, and the shift away from professional services?

And many more questions whose answers can have a significant impact on your bottom line.

This report contains the research against which all other industry analyses are measured. If you have used the report before, you know how good it is. If y aven't, why not use the enclosed order form to find out how easy it is to understand the market you're in?

REPORT CONTENTS

Call, fax, or mail your order to INPUT
to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House, 33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sedetenstrasse 9
D-6306 Langgöns-Niederkleen, West Germany

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

CVAN3 9/90

INPUT®

Information Services Industry

Vendor Analysis Program—U.S.

Vendor Analysis Program—U.S.

GUIDE TO A FRAGMENTED INDUSTRY

The Information Services industry is highly fragmented. It is also intensely competitive and has a rapidly changing market structure. Participating in this industry requires access to information and knowledge on vendors and their characteristics. Through the Vendor Analysis Program, clients are able to satisfy this need.

The Vendor Analysis Program is based on INPUT's 15 years of tracking vendors in the information services industry. It provides access to files on thousands of vendors and detailed profiles on hundreds of the most important companies.

Information from the Vendor Analysis Program is critical for competitive analysis and purchase, acquisition, and alliance decisions.

VENDOR PROFILES

Profiles of public and private information services vendors are the cornerstone of the Vendor Analysis Program. Profiles focus on 'hidden' vendors: divisions of large companies, private companies, and small fast-growing vendors. They include:

- General information (company name, address, telephone, chief executive's name, public/private, employees, revenues)
- Summary of company origin, merger/acquisition history, events impacting company growth
- Financial data
- Revenue distribution by delivery mode
- Employee and organization data
- Key products and services
- Industry markets served
- Geographic markets served

TYPES OF VENDOR COVERED

- Professional Services
  - Consulting
  - Education/Training
  - Software Development
  - Systems Operations (FM)
- Systems Integration
  - Commercial
  - Federal Government
- Applications Software Products
  - Vertical Industry Specific
  - Cross-Industry
- Systems Software Products
  - Systems Control Software
  - Data Center Management Software
  - Applications Development Tools (CASE)
- Processing Services
  - Transaction Services
  - Utility Services
  - Systems Operations (FM)
  - Other Processing Services
- Network Services
  - VANs
  - EDI
  - Electronic Mail
  - Electronic Information (Data Base) Services
- Telecommunications Services
- Turnkey Systems
  - Vertical Industry Specific
  - Cross-Industry
- Third-Party Maintenance

INPUT®

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of profile data.

Access to Files on 4,000 Vendors
INPUT maintains files on over 4,000 information services vendors. Access is through the "Hotline" or by visiting the Mountain View information center.

Client Conference
This annual conference enables INPUT's clients to be updated on key strategic industry trends and developments, as well as to meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- The Vendor Analysis Program—Europe provides company profiles and support data on European information services vendors.
- Market Analysis Program analyzes and forecasts the computer/communications software and services markets in the U.S. and Western Europe.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

VENDOR PROFILES

- Information Services Vendors
  - Public Companies
  - Private Companies
  - Divisions of Large Companies
- U.S. and Canada
- Company Background
- Products and Services
- Revenue and Employee Data

CLIENT SUPPORT

- Access to INPUT Consultants
- Access to Files on 4,000 Vendors
- "Hotline" Inquiry Service
- Client Conference

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

Vendor Analysis Program (VAP) 1990 Program

Vendor Profiles	Vendor "Hotline" Service	Client Support
Monthly Profile Delivery	Systems Integration Vendors	Access to INPUT Information Centers
Key Vendors	Professional Services Vendors	- More than 3,000 Vendor Files
Private Companies	Applications Software Vendors	- More than 300 Industry Periodicals and Directories
Divisions of Large Companies	Systems Software Vendors	
Public Companies	Processing Services Vendors	INPUT Annual Executive Conference (optional; reduced fee)
	Network Services Vendors	
	Communications Services Vendors	
	Turnkey Systems Vendors	

...Delivery mode & vertical market subset programs available

INPUT's 1990 Vendor Analysis Program—U.S.

Yes!
Please enter my order as described:

Subscription to INPUT's Vendor Analysis Program (VAP) at the fee of $10,500.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning ____________. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period. Subscription fee payment in full covers lease of all VAP materials for term of subscription. Unless subscription is renewed, all VAP Materials must be returned to INPUT within ten (10) days of end of subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

- ❑ Enclosed is my check in the amount of $________________.
- ❑ Bill my company on purchase order number ______________ in the amount of $________________.

Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

1288S-VAP 12/89

Information Systems Module (ISM) 1990 Program

Issue Studies*	Client Support
Key Trends/Technology for the 1990s	"Hotline" Inquiry Service
Outside Service/Product Strategies	Access to INPUT Centers
Executive Information Systems	On-Site Presentation (optional; additional fee)
	IS Consulting Services (optional; additional fee)
	INPUT Annual Executive Conference (optional; reduced fee)

* Preliminary Topics

INPUT's 1990 Information Systems Module

Yes!
Please enter my order as described:

Subscription to INPUT's Information Systems Module (ISM) at the fee of $7,500.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning ____________. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

❑ Enclosed is my check in the amount of $________________.

❑ Bill my company on purchase order number ______________ in the amount of $________________.

Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

Accepted By INPUT:

Signature

Name

Title

Date

1288S-ISM 12/89

CONFERENCES

INPUT®

SYSTEMS INTEGRATION: APPLICATION OPPORTUNITIES

A Conference on the Hot Applications in Systems Integration

May 3 & 4, 1990
Sheraton International Conference Center
Reston, Virginia

INPUT
1953 Gallows Road, Suite 560 • Vienna, VA 22182
California • New York • Washington D.C. • London • Paris • Tokyo

Systems Integration: Application Opportunities

Key Benefits of Attending this Conference

- You will learn about the demand and opportunity for three of the most widely discussed application and technology areas:
  - Image Processing
  - Network Integration
  - Computer-Integrated Manufacturing
- You will learn about the status and recent developments in CASE
- Bring yourself up to date on current market issues

Who Should Attend?

- Systems Integration vendor marketing and operating executives
- Systems Integration planning management
- Information Services firms considering SI participation
- Executives of companies who are contemplating using Systems Integration Services
- Computer equipment providers
- Professional services firms
- Systems Operations companies

CONFERENCE OVERVIEW

INPUT, a leading provider of information systems and services research and consulting, is pleased to present a conference that focuses on the new and expanding issues of the systems integration (SI) market. Seldom has an information service caught on as rapidly as SI.

Users have embraced it as an alternative for implementing information-based solutions. Vendors are using it as the ultimate channel for delivering their products and services to large and intermediate customers. The SI market offers revenue and profit opportunities for large and small vendors as prime or subcontractors.

Expand your perspectives regarding systems integration by attending this INPUT conference that will include presentations and a panel discussion on the market and three key application areas. Systems integration users and buyers will discuss their actual experiences implementing systems. INPUT consultants will prese industrywide research on opportunities for these applications and technologies. If you're involved in SI today, or contemplating entry, you need to be aware of new market developments. This is a valuable opportunity to inform yourself.

OUR SYSTEMS INTEGRATION CREDENTIALS

In 1984, INPUT foresaw the growing need for SI planning data, and we included it in our Market Analysis Program (MAP). Since then, SI has become the fastest growing opportunity in the information services market. In 1987, INPUT established a separate Systems Integration Program (SIP) to handle the special needs of clients that were focused on the SI market. This research and consulting service is extremely comprehensive—we believe the best in the business—and it is coordinated with INPUT's other information services research and consulting programs. Our service is subscribed to by most of the leading SI vendors in the U.S. We have a similar service in Europe and have developed sizings of this market in the remaining areas of the world, as well...

In conjunction with the Systems Integration Program, INPUT provides the annual conference which is described herein. Our clients can attend the conference as part of their service contract. Companies that do not yet subscribe are invited to attend the conference for the fees listed on the back of this brochure. A limited number of seats are available for non-subscribers, so please register early.

INPUT®

1953 Gallows Road, Suite 560, Vienna, VA 22182
703-847-6870 Fax 703-847-6872

Dear Executive:

Systems integration has become one of the most successful delivery channels for information products or services. If you are already participating in this market or considering entering it, you should attend INPUT's Systems Integration Conference described in the enclosed brochure.

The conference will provide you with important information on SI market trends and user and vendor issues. Please join us on May 3 and 4 in Reston, Virginia.

Yours sincerely,

Douglas R. Wilder

Douglas R. Wilder
Director, Systems Integration Program

INPUT
Systems Integration Conference
May 3 & 4, 1990
Sheraton Hotel, Reston, VA

Register today by calling 703-847-6870

Fee Schedule
The regular conference fee is $695; $495 for additional attendees from the same company. Per their contract, subscribers to INPUT's Systems Integration Program may send two representatives at no charge. Additional client personnel may attend the conference at a charge of $295.

EARLY BIRD DISCOUNT—Registrations received before April 1, 1990 take off 10%

Registration Form
Yes! Please sign me up for the Systems Integration Conference, May 3 & 4, 1990 at the Sheraton Hotel, Reston, VA.

- ❑ Check enclosed in the amount of $______________
- ❑ Bill me in the amount of $___________ on Purchase Order #____________.
  Payment must be received before conference.
- ❑ Charge $_______________ to my American Express #______________________.
  Exp. date _______________ Signature __________________________________.
- ❑ Systems Integration client attending at no charge.

Name: ____

Title: ____

Company: ____________________________________

Address: _____________________________________

City: _______________________ State _______ Zip __________________________

Telephone: (_________)__________________ Signature:___________________________

(Please duplicate this form for additional attendees and return the forms together)

Conference space is limited! To ensure your reservations, either mail this form to INPUT, 1953 Gallows Road, Suite 560, Vienna VA 22182, or call Barbara Fisher, Conference Coordinator, at (703) 847-6870. You can also FAX your registration to us at (703) 847-6872

Cancellations must be in writing. Cancellations received after April 3 will be assessed a $50 cancellation fee.

INPUT®

CONFERENCE AGENDA

THURSDAY, MAY 3

8:00 *Registration and Continental Breakfast*

8:45 *Welcome and Introduction*

9:00 **Systems Integration Market**—An update of INPUT research on the systems integration and systems operations markets

10:00 **Network Integration**—A presentation of INPUT's study of the network integration submarket, including user and vendor views of its relationship to systems integration opportunities.

11:00 *Break—Refreshments*

11:15 **Image Processing**—A discussion of INPUT's analysis of image processing technology and applications prospects, based on both user and vendor views of this submarket.

12:15 *Lunch*

1:30 **Buyers' Experience**—Two systems integration executives will discuss their firms' actual experiences in planning for and implementing systems integration projects. These discussions will focus on managing the vendor interface and the benefits that systems integration provides. Projects that include image and network integration will be addressed.

3:45 *Break—Refreshments*

4:00 **CASE Products**—A presentation and discussion of INPUT's research on CASE products and their impact on the systems development and implementation process and on systems integration.

FRIDAY, MAY 4

8:00 *Continental Breakfast*

8:30 **Computer-Integrated Manufacturing** —A status report and intermediate results of INPUT research of vendor and user views of the CIM market- place including driving forces and a forecast of end-user expenditures.

9:00 **Buyer's Experiences**—A systems integration buyer will discuss actual experiences implementing a CIM system through systems integration. The discussion will include managing the vendor interface and the benefits that systems integration provides.

10:00 *Break—Refreshments*

10:15 **Outsourcing—A Variety of Options**—A panel discussion by vendor executives of the pros and cons of outsourcing alternatives. The discussion will include business consulting, systems integration and systems operations, and relationships between these information services delivery modes.

12:00 **Report** on INPUT's 1990 Systems Integration Program progress and plans.

12:30 *Lunch*

1:30 **INPUT Consultants** will be available to discuss with you topics of your interest in the systems integration market.

REGISTER TODAY!
CALL INPUT
(703) 847-8670
FAX (703) 847-6872

EARLY BIRD DISCOUNT
Conference registrations received before April 1, 1990
TAKE OFF 10%

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

SYSTEMS INTEGRATION: APPLICATION OPPORTUNITIES

May 3 & 4, 1990, Sheraton International Conference Center, Reston, Virginia

CONFERENCE REGISTRATION FEES

Clients—Of course, INPUT Systems Integration clients may send two representatives as part of their service contract. Additional client personnel may attend the conference at a charge of $295.

Non-clients—The first representative of a non-client company may attend the conference for $695. Additional attendees from the same non-client company may attend for $495.

PAYMENT AND CANCELLATION POLICY
You may cancel your reservation without a $50 cancellation fee until April 3, 1990. Cancellations must be in writing. INPUT will consider purchase order numbers or company checks as proper reservations. INPUT reserves the right to make changes to this conference without notice.

SI-IRC 2/90

ACCOMMODATION

Only minutes from Washington Dulles International Airport and only twenty minutes from downtown Washington D.C., the Sheraton's International Conference Center provides complete conference and guest accommodations. The hotel offers the finest amenities and accommodations and a very special price for INPUT SI Conference attendees: only $90 single or $100 double.

Please make your reservations directly with the conference center by calling (703) 620-9000; ask for the INPUT group rate. Room space can only be guaranteed until April 16, 1990, so book early!

REGISTER TODAY!
CALL 703-847-8670 or mail or fax the registration form today!

OUTSOURCING OF INFORMATION SYSTEMS

INPUT®

Join INPUT's analysts and knowledgeable guests to discuss the potential revolution in the 1990s in the development and operation of computer/ communications systems.

June 7 & 8, 1990
Omni Shoreham Hotel
Washington, D.C.

Limited attendance—please confirm early to avoid disappointment

Outsourcing of Information Systems

INPUT's 12th Annual Executive Conference

Attend this conference on outsourcing in information systems to evaluate the opportunities and problems associated with the various approaches.

For 30 years the primary source of computer/ communications systems development and operations has been internal departments. During this time, however, there has been an overgrowing computer software and services industry providing solutions to customer needs. This industry, the information services industry, is now a $180 billion per year market worldwide.

The revolution in the 1990s is the shift from internal to external sources of software and solutions. This revolution is happening more rapidly than many expected.

This conference is about that revolution.

Questions to be addressed by INPUT analysts and panels of invited guests include:

What is "outsourcing?"

Why is it becoming so much a concern today?

What are the different vehicles for outsourcing?

How will the various markets develop?

What are the market forecasts through 1995?

Who takes responsibility?

What are the impacts on "competitive advantage?"

What about security when using external vendors?

What are the financial costs and benefits?

What about impacts on information systems organizations and people?

What is "change management?"

What is the role of business consultants in outsourcing?

Which vendors are offering what services?

What have been customer experiences of outsourcing?

What are the relationships between systems integration and systems operations?

What sources of skills will be used in the future?

What opportunities exist for customers and vendors?

What will be the impact on information systems and services vendors? Who will win?

These and many other questions, will be addressed during this critical conference. You are invited to presubmit your questions.

INPUT's Executive Conference has been the prime forum for examining future trends in information services for the past 12 years. The combination of experienced computer industry professionals, objective research, and strong customer interaction has produced an environment for the presentation of new ideas and the identification of trends that have actually come to pass.

In the last ten years, the growth of the microcomputer (pre-PC) in business (1980), the importance of connectivity and networks (1982), systems integration (1984), and systems operations (1988) have been among the keynote projections of this conference.

Who should attend?

"Outsourcing" is the conference to attend to determine the direction your company should take. To what extent should you participate in the markets as a buyer or seller; in some cases as both? The conference is for people with these questions.

- CIOs
- Planning Executives
- Business Executives with Information Systems Customers and Vendors
- Software and Services Executives

Key Benefits of Attending:

Discuss this critical issue with INPUT analysts, customers, and vendors involved in outsourcing.

- Learn about the trends and potential impacts on the industry of "outsourcing."
- Examine the competitive structure of the industry to determine the "players."
- Obtain the necessary information to direct your company's position in this arena.
- Get ahead of the curve as the revolution rolls forward.

Information Systems Outsourcing — A Global Perspective:

The switch from internal to external sources of information systems resources has been occurring for years. The information services industry provides customers with the external capabilities. How big is this business on a worldwide basis? What are the overall trends in the U.S., Europe, and Japan? This session forms the framework for the conference answering basic questions as to "Why?" and "Why Now?"

The session presents major types of outsourcing and how they relate; leading competitors in the industry are introduced.

Systems Development Outsourcing:

These services are devoted to the development, installation, and maintenance of applications.

Systems Integration—Acceptance:

In the last six years, systems integration has become accepted by non-federal government organizations as a viable method of developing systems that work. The concept of a vendor taking responsibility for the development and installation of complex systems has proven appealing to customers faced with increasing demands and limited resources.

In this session, INPUT will discuss with participants in the industry; customer requirements, success criteria for SI projects, partnering aspects that work or fail, and projections of the types of systems integration projects that will grow in the 1990s. Particular attention will be paid to network integration and image processing applications.

Professional Services—Multiplicity of Choice:

The prime alternative to in-house information systems staffing is to use professional services resources. The driving forces, including labor scarcity, employment considerations, and flexibility are examined in this session.

Each major type of professional service is examined, as well as "project responsibility" and "resource" contracting alternatives. The concepts of "systems management," "change management," and contracted maintenance are introduced and discussed with proponents in the industry.

Applications Software Products—Part of the Solution:

These packages provide alternatives to custom-made software. As with other "off-the-shelf" items, they must be tailored to the customer's specifications. This session examines how this is accomplished. The overall factors influencing the growth of the market and the "make or buy" decisions are examined.

The affects of trends to standard platforms are analyzed as are the impacts of increasing use of CASE technology. Repository and automated library functions are discussed by industry experts: they will change the concept of application development and implementation.

The convergence of custom and package software is examined together with the implications for customers and providers.

Interaction:

The day will close with an intense question and answer period involving customers, vendors, and INPUT analysts. Attendees may pre-submit questions to be addressed during this session.

The evening will include a reception for attendees to provide an opportunity for free discussion and the formation of dinner groups.

Systems Operations Outsourcing:

These services are devoted to the operation of computer/communications systems.

Systems Operations— The Revolution of the 1990s?

Systems Operations is potentially the most revolutionary market of the 1990s. It is an outgrowth of "facilities management"—but customers do not buy management of a facility, they buy operation of a computer/communications system in which they participate in the management. Recent events such as the entry of large computer manufacturers and professional services companies have stirred up this market.

The financial methods employed, the reasons for systems operations as a viable alternative to in-house information systems, and the various forms of systems operations are all explored with participants in the industry. Computer ownership and location issues are addressed and INPUT research and forecasts presented.

Relationships with systems integration and their services are examined. Vendor approaches to platform and application operations are discussed with the implications for customers.

The impact on the rest of the industry of systems operations is considerable. Financing implications abound. These are examined in detail by INPUT and its guests.

Processing Services—Variety and Growth of Outsourcing Alternatives:

Many companies use some form of processing service from payroll through industry specialized services such as credit card processing. Disaster recovery is another service which is "enjoying" increasing use.

These services are bought on an application-by-application basis as opposed to the "complete package" as with systems operations. Their use is steadily increasing. Through mergers and acquisitions, some of the vendors are becoming very large, with the ability to afford the development costs for the new generation of systems.

INPUT will examine processing services positions in the outsourcing spectrum and projections for 1995. Customer needs for transaction processing and services will be discussed.

Network Applications and Operations Services—The Battleground of the 1990s

The final structured session of the conference examines customers' alternatives in the network area.

As telecommunication networks become more complex and powerful, they will provide numerous opportunities for outsourcing. Various outsourcing alternatives in the development and operation of networks are examined including network integration and operations service. Sources of service are discussed.

In particular, the impact of the telephone companies will be considerable on an international basis. Their rapid expansion is examined and the implications critiqued.

Interaction:

The conference will conclude with another intensive question and answer period with vendors, customers, and INPUT analysts.

OUTSOURCING OF INFORMATION SYSTEMS

Day One

7:30 - 8:30	*Registration and Continental Breakfast*
8:30 - 9:30	Information Systems Outsourcing • Global Perspective • Internal and External Factors • Competitive advantages/Disadvantages
9:30 - 9:45	*Break*

Systems Development Outsourcing

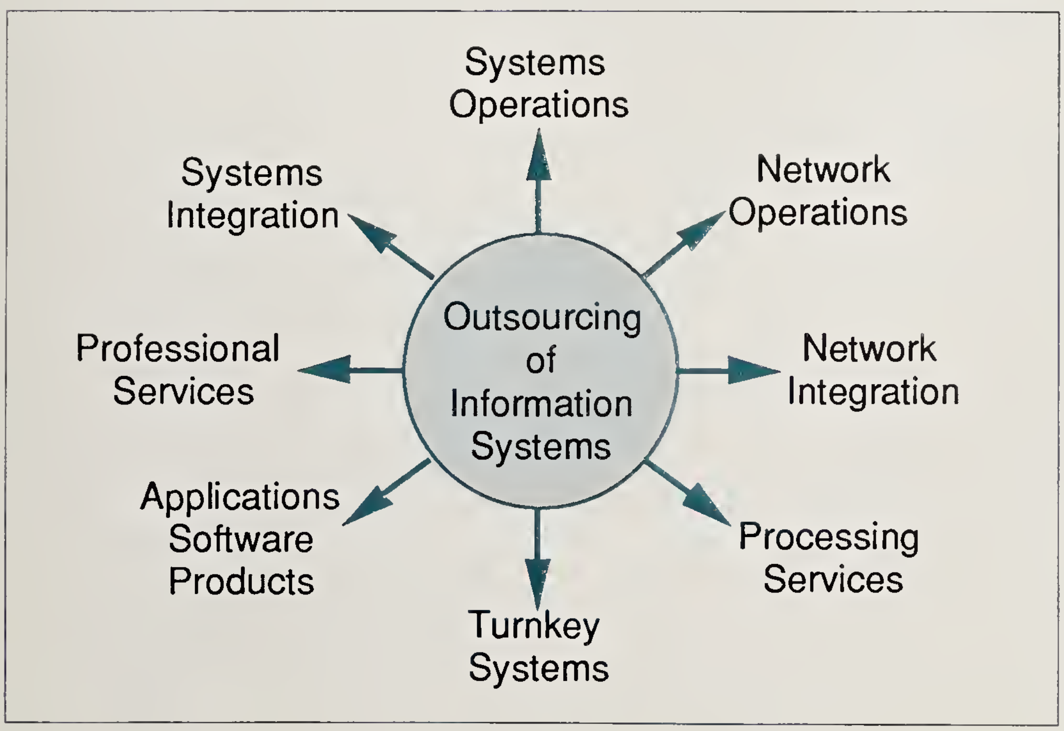
9:45 - 11:30	Systems Integration • Industry Trends and Forecasts • Responsibility Issues • Vendors and Capabilities • Approaches • Customer Requirements
11:30 - 1:00	*Lunch*
1:00 - 2:30	Professional Services • Industry Trends and Forecasts • Labor and Skills Considerations • Conversion • Systems Management
2:30 - 2:45	*Break*
2:45 - 4:15	Applications Software Package Solutions • Industry Trends and Forecasts • Application Development Issues • Combinations with Professional Services • Partnering Among Vendors
4:15 - 5:00	Questions and Answers
5:30 - 7:30	*Cocktail Reception*

Day Two

7:00 - 8:00	*Continental Breakfast*

Systems Operations Outsourcing

8:00 - 10:00	Systems Operations • Industry Trends and Forecasts • Financial Consideration • Method of Operation	• Customer Requirements • Security
10:00 - 10:15	*Break*	
10:15 - 11:30	Processing Services • Industry Trends and Forecasts • Transaction Processing by: - Industry (eg., Banking) - Function (eg., Payroll)	• Application Sources • Vendor Trends
11:30 - 1:00	*Lunch*	
1:00 - 2:30	Network Operations • Industry Trends and Forecasts • Customer Requirement • Vendor Sources	• Public versus Private Networks • Network Management Services
2:30 - 3:30	Questions and Answers	



OUTSOURCING OF INFORMATION SYSTEMS
June 7 & 8, 1990, Omni Shoreham Hotel, Washington, D.C.

CONFERENCE REGISTRATION

Conference fees:
- First attendee from a company $1395
- All additional attendees $995

Subscribers to INPUT's Market Analysis Program may attend at the fee of $495 per person.

PAYMENT AND CANCELLATION POLICY
You may cancel your reservation without a 25% cancellation fee until May 9. Cancellations must be in writing. INPUT will consider purchase order numbers or company checks as proper reservations. We also accept American Express. INPUT reserves the right to make changes to this conference without notice.

ACCOMMODATIONS

Washington's famous Landmark Hotel, the Omni Shoreham, beautifully restored to the grand style of days gone by and uniquely located on 11 tranquil acres in Rock Creek Park in the heart of Washington, D.C., just one block from Woodley Park Metro Station, minutes from the Smithsonian Institute, museums, the Capitol, and walking distance from the National Zoo.

Hotel reservations may be made by calling the Omni Shoreham at (202) 234-0700. Be sure to ask for the INPUT Conference special rate. Available rooms may be taken quickly, so please contact the hotel promptly.

REGISTER TODAY! In the U.S. call 415-961-3300 or mail or fax the registration form today! FAX: 415-961-3966. Internationally, contact INPUT at the numbers below.

INPUT Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

INPUT **CONFERENCE • WASHINGTON, D.C. • JUNE 7 & 8, 1990**

Critical Issues In Outsourcing Of Information Systems

Open, direct, and in-depth interaction with experts, vendors, and your peers—INPUT provides this essential environment to help you make decisions on contracting your information services to outside vendors.

Critical Issues To Be Addressed Include:

- Service Options:
  - What is outsourcing?
- Strategic Objectives:
  - What are the short-term versus long-term benefits?
  - How can outsourcing create competitive advantage?
  - Can you achieve the same benefits yourself?
  - What is the experience of your peers?
- Financial Considerations:
  - What are the financial costs and benefits?
  - How flexible is your budget with outsourcing?
  - Have savings claims been exaggerated?
  - What could you save through outsourcing?
- Implementation:
  - Who takes responsibility in outsourcing?
  - What is the impact on organizations and people?
  - How do you manage change?
  - What role should consultants play?

Who Should Attend:
CIOs
Planning Executives
Software and Services Executives
Executives with Information Systems Customers
and Vendors

Where:
OMNI Shoreham Hotel
Washington, D.C.

Format:
Beginning at 8:00 a.m., two days of panel discussions, group discussions, lectures, question-and-answer sessions, and informal interaction with experts and peers.

A 5:30 p.m. reception ends the first day.

Day two ends at 3:30.

Fees:
One attendee...$1,395
Additional...$995

REGISTER IMMEDIATELY!
Attendance is limited
Call: 415-961-3300
Fax: 415-961-3966

Future INPUT Seminars

Systems Integration
Application Opportunities
May 3 & 4, 1990
Reston, Virginia

•

Annual Federal Market Conference
Fall 1990

INPUT—Provides planning information, analysis and recommendations to business. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

INPUT

1280 Villa Street
Mountain View, CA, 94041-1194

OUTSOURCING OF INFORMATION SYSTEMS

Day One

7:30 - 8:30 — *Registration and Continental Breakfast*

8:30 - 9:30 — **Peter A. Cunningham, President, INPUT**

KEYNOTE: INFORMATION SYSTEMS OUTSOURCING
- Global Perspective
- Internal and External Factors
- Competitive advantages/Disadvantages

Systems Development Outsourcing

9:45 - 11:30 — **John Oltmen, Title, Company**
Mel Bergstein, Title, Company
Moderated by Doug Wilder, Systems Integration Program Director, INPUT

SYSTEMS INTEGRATION
- Industry Trends and Forecasts
- Responsibility Issues
- Vendors and Capabilities
- Approaches
- Customer Requirements

11:30 - 1:00 — **Vic Millar, Title, Company**

MANAGING CONSULTING FIRMS
Lunch

1:00 - 2:30 — **Steve Carns, Title, Company**
Dave Campbell, Title, Company
Moderated by Norman Litell, Market

PROFESSIONAL SERVICES
Analysis Program Director, INPUT
- Industry Trends and Forecasts
- Labor and Skills Considerations
- Conversion
- Systems Management

* 2:45 - 4:15 — **Speaker to be announced**
Moderated by John Frank, President, INPUT INC.

FEDERAL GOVERNMENT OUTSOURCING

4:15 - 5:00 — QUESTIONS AND ANSWERS
Moderated by R. Dennis Wayson, Vice President, INPUT, Norman Litell, Doug Wilder, and John Frank

5:30 - 7:30 — *Cocktail Reception*

Day Two | 7:00 - 8:00 | *Continental Breakfast*

Systems Operations Outsourcing

8:00 - 10:00

Gary Fernandes, Title, Company
John Cudworth, Title, Company
Moderated by Doug Wilder

SYSTEMS OPERATIONS

- Industry Trends and Forecasts
- Financial Consideration
- Method of Operation
- Customer Requirements
- Security

10:15 - 11:30

~~**Dr. Randall Gannaway, Title, FMC**~~
Tom Esposito, Title, IBM
Moderated by Thomas O'Flaherty, Vice President, INPUT

PROCESSING SERVICES

- Industry Trends and Forecasts
- Transaction Processing by:
  - Industry (eg., Banking)
  - Function (eg., Payroll)
- Application Sources
- Vendor Trends

11:30 - 1:00

Lunch—No speaker

1:00 - 2:30

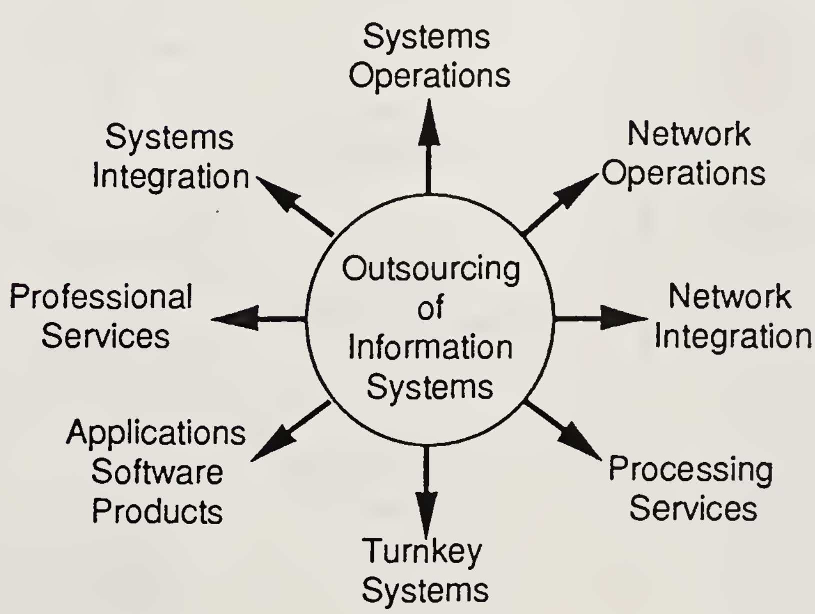
Bill Perin, Title, Company
Moderated by Alex Graham, Principal Consultant, INPUT

NETWORK OPERATIONS

- Industry Trends and Forecasts
- Customer Requirement
- Vendor Sources
- Public versus Private Networks
- Network Management Services

2:30 - 3:30

QUESTIONS AND ANSWERS
Moderated by Denny Wayson, Doug Wilder, Alex Graham, Tom O'Flaherty, Peter Cunningham

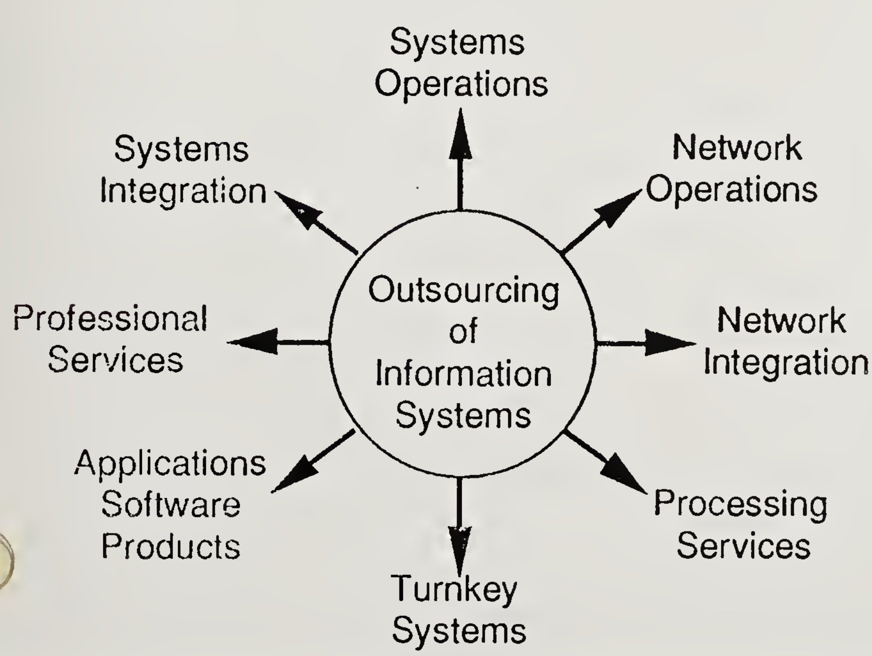


INPUT®

The "Outsourcing" Revolution!

- What Is Outsourcing?
- Does It Make Sense?
- Can I Be in the Forefront?

Join industry leaders, outsourcing experts, and INPUT's analysts. Discuss the potential revolution of the 1990s in the development and operation of computer/communications systems.



INPUT Conference

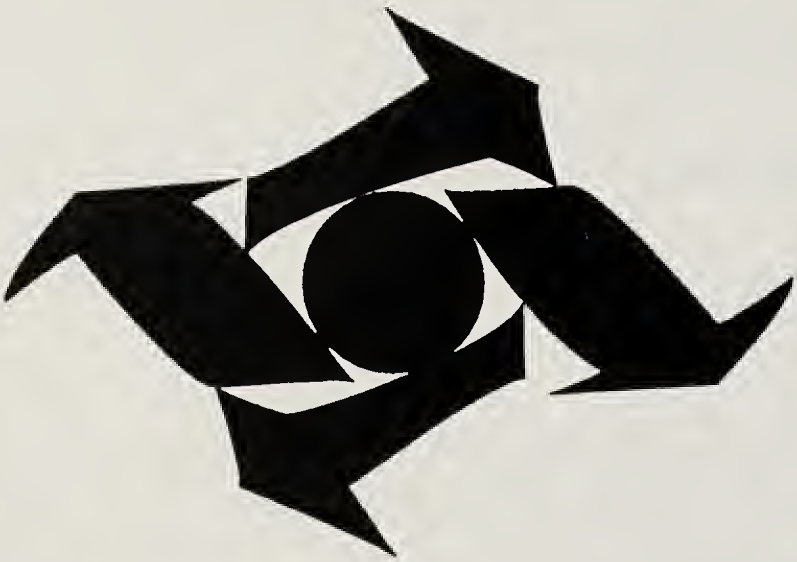
June 7 & 8, 1990

Omni Shoreham Hotel

Washington, D.C.

CALL INPUT (415) 961-3300

Learn about the "Outsourcing" Revolution



Critical Issues to be Addressed Include:

- Service Options:
  - What is outsourcing?
- Strategic Objectives:
  - What are the short-term versus long-term benefits?
  - How can outsourcing create competitive advantage?
  - Can you achieve the same benefits yourself?
  - What is the experience of your peers?
- Financial Considerations:
  - What are the financial costs and benefits?
  - How flexible is your budget with outsourcing?
  - Have savings claims been exaggerated?
  - What could you save through outsourcing?
- Implementation:
  - Who takes responsibility in outsourcing?
  - What is the impact on organizations and people?
  - How do you manage change?
  - What role should consultants play?

Who Should Attend:

- CEOs
- CFOs
- CIOs
- Planning Executives
- Software and Services Executives
- Executives with Information Systems Customers and Vendors

INPUT Conference

OUTSOURCING OF INFORMATION SYSTEMS

June 7 & 8, 1990
Omni Shoreham Hotel
Washington, D.C., U.S.A.

Register today by calling any INPUT office

Conference Fees

Subscribers to INPUT's Market Analysis Program may attend at the fee of $495 per person.

First attendee from a non-subscribing company...$995; All additional attendees from the same company...$495.

Registration Form

Yes! Please sign me up for the Executive Conference, June 7 & 8, 1990 at the Omni Shoreham Hotel, Washington, D.C., U.S.A.

- ☐ Check enclosed in the amount of $________________
- ☐ Bill me in the amount of $________________ on Purchase Order #__________________.

  Payment must be received before conference.
- ☐ Charge $________________ to my American Express # ____________________________.

  Exp. date __________________ Signature ______________________________________.

Name: ____

Title: ____

Company: ____

Address (include zip or country): ____

____

Telephone: (__________)____________________ Signature:______________________________

(Please duplicate this form for additional attendees and return the forms together)

Conference space is limited! In the U.S., either mail this form to
INPUT, 1280 Villa Street, Mountain View, CA, 94041 or
call Christine Carter, Conference Coordinator, at (415) 961-3300.
You can also FAX your registration to us at (415) 961-3966
or contact any INPUT office listed below.

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Fax (201) 263-8341

London—Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Tokyo—Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531
Fax (03) 864-4114

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870
Fax (703) 847-6872

Paris—52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Cancellations must be in writing and are subject to a 25% cancellation fee if received after May 23, 1990.
INPUT reserves the right to make changes to this conference without notice.

JJJJ 5·15·90 r s

INPUT®

Open, direct, and in-depth interaction with experts, vendors, and your peers—INPUT provides the essential environment to help you make decisions: should you contract your information services to outside vendors?

The conference will begin at 8:00 a.m., with two days of panel sessions, group discussions, lectures, question-and-answer formats, and informal interaction with experts and peers. A 5:30 p.m. reception will end the first day. Day two ends at 3:30 p.m.

Get the Information You Need On:

- **Information Systems Outsourcing**
  Our keynote topic will tell you:
  - What is it?
  - Why is it becoming a major factor?
- **Systems Development Outsourcing**
  - Systems Integration Outsourcing
  - Role of Consultants in Outsourcing
  - Role of Professional Services in an Outsourcing Program
  - Outsourcing Support and Maintenance Operations
  - Federal Government Outsourcing
- **Systems Operations Outsourcing**
  - Outsourcing of Applications Operations
  - Outsourcing of Systems Operations
  - User Requirements in an Outsourcing Environment
  - Outsourcing Impact on People
  - International Network Outsourcing
- **Explored from the Viewpoint of:**
  - Industry Trends and Forecasts
  - Trends in Cost Factors
  - People and Skills Issues
  - Planning an Outsourcing Strategy

Sessions will be moderated by INPUT analysts:

- Peter Cunningham, Chairman/CEO
- John Frank, President (INPUT INC.)
- R. Dennis Wayson, Vice President
- Thomas O'Flaherty, Vice President
- Norman Litell, Director, Market Analysis Program
- Doug Wilder, Director, Systems Integration Program
- Alex Graham, Principal Consultant

Speakers Include the Following Industry Leaders and Outsourcing Experts:

(partial listing)

★ **Mel Bergstein**, Senior Vice President, CSC Partners

★ **Dave N. Campbell**, Chairman/CEO, Computer Task Group

★ **John L. Cudworth**, Vice President, Litton Computer Services

★ **Peter A. Cunningham**, Chairman/CEO, INPUT

★ **Tom Esposito**, Vice President, IBM Corporation

★ **Gary Fernandes**, Senior Vice President, Electronic Data Systems

★ **Dr. Randall Gannaway**, Director, Corporate Data Center, FMC Corporation

★ **Thomas Solomon**, Vice President, Genix Corporation

★ **Vic Millar**, Chairman, PSF Management International

★ **John Oltman**, Partner, Andersen Consulting

★ **William E. Perren**, President, Development and Operations, INFONET

★ **John Steuri**, Chairman/President, Systematics

Limited attendance—please confirm early to avoid disappointment

CALL INPUT
(415) 961-3300

OUTSOURCING OF INFORMATION SYSTEMS
June 7 & 8, 1990, Omni Shoreham Hotel, Washington, D.C.

CONFERENCE REGISTRATION

Conference fees:
Subscribers to INPUT's Market Analysis Program may attend at the fee of $495 per person.

- First attendee from a non-subscribing company...$995
- All additional attendees...$495

PAYMENT AND CANCELLATION POLICY
Cancellations must be in writing and are subject to a 25% cancellation fee if received after May 23. INPUT will consider purchase order numbers or company checks as proper reservations. We also accept American Express. INPUT reserves the right to make changes to th conference without notice.

FLIGHT ARRANGEMENTS

In making flight arrangements, please be aware that we have a program with American Airlines allowing you the following discounts:

- 40% off of full coach fare
- 5% off any already discounted fare

If interested, please place your reservation under Star #S0360G6 and specify dates of travel. These rates are available through Dulles, National and Baltimore/Washington airports.

ACCOMMODATIONS

Washington's famous landmark hotel, the Omni Shoreham, beautifully restored to the grand style of days gone by and uniquely located on 11 tranquil acres in Rock Creek Park in the heart of Washington, D.C., just one block from Woodley Park Metro Station, minutes from the Smithsonian Institute, museums, the Capitol, and walking distance from the National Zoo.

Hotel reservations may be made by calling to the Omni Shoreham at (202) 234-0700. Be sure to ask for the INPUT Conference special rate. Available rooms may be taken quickly, so please contact the hotel promptly.

Yes! Please confirm my registration for the
INPUT Conference, June 7 & 8, 1990
Washington, D.C.

Company ______________________

Name ______________________

Title ______________________

Address ______________________

City ______ State ______ Zip ______

Phone ______________________

Signature ______________________

- ❑ I am registering as an INPUT subscriber. Bill my company $495.
- ❑ I am registering for this conference. Bill my company $995.
- ❑ I am registering as an additional attendee. Bill my company $495.

P.O #______________________

- ❑ Check enclosed for $______________
- ❑ Charge $______________ to my American Express card

#______________________

Expiration date ______________

____
Signature

- ❑ Have a representative call me.

INPUT 1280 Villa Street •Mountain View, CA 94041 • 415-961-3300 •Fax 415-961-3966

JJJJ 4/90

EUROPE CATALOGS

INPUT®

U.S. Information Systems and Services Industry

Federal Information Systems and Services Program

Federal Information Systems and Services Program

FEDERAL MARKET OPPORTUNITY

The federal government will spend more than $21 billion dollars annually on computer systems, computer services, software, and communications by 1994.

The majority of these dollars will be won by vendors well informed about federal procurement plans and practices. INPUT's Federal Information Systems and Services Program can help you win federal business.

PROCUREMENT ANALYSIS REPORTS

These reports, issued monthly, identify and track individual defense and civil agency procurement opportunities up to five years in advance of RFP release; they are indexed by agency, fiscal year of start, and system/service mode.

PROCUREMENT ANALYSIS REPORTS

- Agency Name
- Program Title
- Funding by Fiscal Year
- Procurement Schedule Target Dates
    - Draft
    - CBD Announcement
    - Pre-Bid Conference
    - RFP-RFQ Release
    - Bid Due Date
    - Award Date
- Description of Program
- Systems/Services to Be Acquired
- Contract Types
- Contract Duration
- Contracting Office (Name and Address)
- Program Office (Name and Address)
- Background/Function
- Analysis
- Acquisition Plan
- Awards to Date

MARKET ANALYSIS REPORTS

Each Market Analysis Report contains five-year market forecasts.

Federal Computer Security Market
Analyzes the market for hardware, software, and services to support federal security concerns. Assesses present and future compliance with the Computer Security Act of 1987, and its impact on market trends.

Federal Telecommunications Market
Assesses the market for federal telecommunications products and services a year after the award of FTS 2000. Analyzes the success of the contract, its effect on other agency contracting activities, and those telecommunications market areas which remain competitive.

Department of Veterans' Affairs Information System Market
Discusses the effect of transition to Departmental status on IS activities, including the reorganization of key executive positions. Identifies the interoperability needs of agency mission areas (including burial services, benefits, and medical support), the growth of EDI, and the redesign of agency administrative systems.

Federal Computer Equipment Maintenance Market
Assesses the trends in this market in light of technology advances, reduced support requirements, and special issues relating to microcomputer maintenance. Addresses the effects of industry consolidation, the federal third-party maintenance market, and cross-vendor maintenance agreements.

Federal Professional Services Market
Forecasts the professional services market, including consulting, education, training, programming and analysis, systems operations (facilities management), and additional areas.

Federal Systems Integration Market
Forecasts the federal systems integration market by component. Analyzes agency trends toward fewer and larger procurements and the resulting impact on teaming arrangements among vendors.

INPUT®

ISSUE PAPERS

Federal Financial Systems Market
Identifies the growing trend toward federal certification of financial systems, including the Joint Financial Management Improvement Program, and its effect on hardware vendors.

Federal Education and Training Market
Expands on the subsegment of federal professional services to assess the impact of computer-based training and new training approaches on vendor sales prospects.

FEDERAL SYSTEMS AND SERVICES CONFERENCE

This two-day conference, held in Washington, D.C., covers INPUT federal market research. Expenditure forecasts are presented together with presentations by government and industry leaders on trends, policies, and methods.

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data. It handles FOIA requests (at nominal additional fees).

Federal Information Center
Clients have access to INPUT's Federal Information Center which houses hundreds of agency planning, budget, and procurement documents, and a wide array of government-related research sources and all other INPUT program reports.

INPUT Client Conference
This conference for all INPUT's clients is on key strategic industry trends and developments. INPUT forecasts are presented and discussed. Attendance at this conference is available at a reduced fee for full subscribers.

PROGRAM DESCRIPTION

PROCUREMENT ANALYSIS REPORTS

- Defense & Civil Agencies
- Indexed by Agency, Fiscal Year Start, and Systems/Service Mode
- Monthly Reports

MARKET ANALYSIS REPORTS

- Federal Computer Equipment Market
- Department of Veterans Affairs Information Services Market
- Federal Computer Security Market
- Federal Professional Services Market
- Federal Systems Integration Market
- Federal Telecommunications Markets
- Federal Financial Systems Market
- Federal Educational and Training Market

FEDERAL SYSTEMS & SERVICES CONFERENCE

- 2-day, Washington, D.C.

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- Client Conference
- Federal Information Center

RELATED SERVICES

Custom research and consulting projects can provide agency research, competitive analysis, acquisition search, contract award research, agency selection practice assessment, and specialized forecasting.

Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/ consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

If You Need Specific Intelligence on Opportunities in the Federal Computer Equipment Maintenance Market . . .

- What are specific agencies' procurement plans through 1995?
- How do buyers evaluate maintenance vendors?
- How big is the market, and how fast is it growing?
- What are successful competitors doing?

... You Need the Latest Report from INPUT!

INPUT has released a new report entitled *Federal Equipment Maintenance Market, 1990-1995* that identifies and analyzes hundreds of millions of dollars worth of federal computer equipment maintenance contracts through GFY 1995.

And if you act before January 25, 1991, you'll pay $175 less than the regular list price for the report—a savings of 10 percent!

Federal Equipment Maintenance Market, 1990-1995
Market Analysis and Forecast
• Current Market Conditions • Market Structure • Market Forecast • Federal Market Issues • Competitive Environment • Leading Agencies
Federal User Requirements and Trends
• Agency Hardware Environment • Performance Requirements • Agency Acquisition Plans and Preferences • Agency Satisfaction with Vendor Performance • Trends
Competitive Trends
• Vendor Participation • Vendor Perceptions • Discounting and Alliance Practices • Maintenance Contractor Selection Criteria • Trends
Key Opportunities
• Present and Future Programs • Equipment Maintenance Opportunities by Agency

If pinpointing procurements was all it did, this report would be well worth such a moderate price. After all, you have to have this intelligence if you are going to know where to deploy your sales, marketing, and engineering resources to make the most of these multimillion-dollar opportunities.

But INPUT does more than just flag pending procurements.

Answers

The report puts this specific information in the context of both the larger forces shaping the market, and the tactical considerations you cannot afford to ignore. Its purpose is to give you answers to all of the major questions you have to address, including:

- To buyers selecting maintenance providers, what is the relative importance of performance and contract cost?
- How do buyers weight other factors in their decisions, such as reputation, cost control procedures, proposed technical solution, and contract type?
- How big is the equipment maintenance market, and which segments are growing fastest?
- How can you shape your business to turn budget constraints, computer obsolescence, the new emphasis on competition, multivendor installations, and widespread microcomputer penetration to your advantage?
- Who are the leading vendors in federal equipment maintenance, and what strategies are they pursuing?

And other information that lets you shape effective strategies for exploiting all kinds of equipment maintenance opportunities for the next five years.

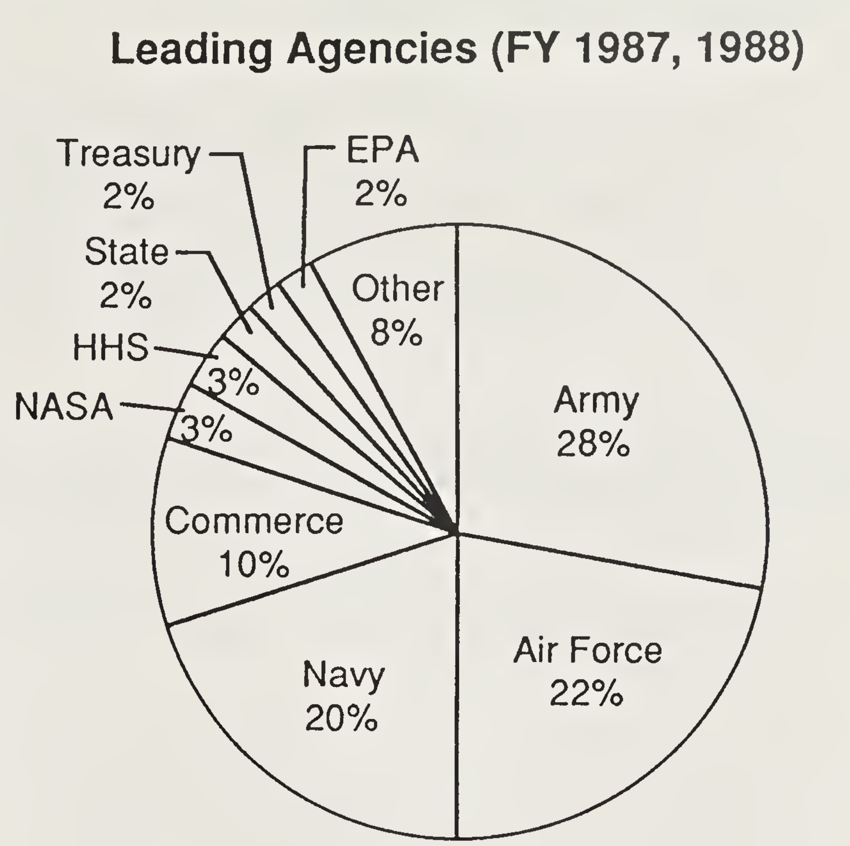
A Competitive Edge

In addition to this large-scale analysis, INPUT's report concentrates on providing specifics on pending procurements together with information on agency practices and competitive trends. And that gives you an edge on companies without access to this kind of in-depth, informed analysis. The report answers questions about:

- Which agencies have obligated the largest expenditures to equipment maintenance over the last two years?
- What is the total number and dollar value of large and midsize systems installed at federal agencies?
- What is the average age of the installed base, by agency?
- What percentage of federal users employ third-party maintenance organizations? OEMs? In-house maintenance services?
- What are the present satisfaction levels of agencies with their maintenance services? What areas do they say need improvement?

And 86 specific agency procurement opportunities, including PAR reference, RFP schedule, and funding for GFY 1990-1995, where known.

INPUT is able to provide some of this information to you through a careful analysis of the OMB/GSA Five-Year Plan submitted in compliance with OMB Circular A-11, budget requests, and other documents. But we have also tapped sources for information not available to the general public, including the Five-Year Defense Plan and supporting documentation.



INPUT IDENTIFIES THE LEADING AGENCIES for purchase of equipment maintenance products and services. This is only one kind of market research available in the report, which includes market analysis and forecast, competitive trends, key opportunities, and user requirement data.

The result is a distillation of millions of words of federal procurement verbiage into a single, clear, and concise volume that pintpoints opportunities and offers a means of exploiting them. This is a powerful competitive weapon in a market where having the right information at the right time can make all the difference.

So use the enclosed order form to get your copy of *Federal Equipment Maintenance Market, 1990-1995* today.

INPUT®

Call, fax, or mail your order to any INPUT office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT Offices

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300 Fax (415) 961-3966

New York
Atrium at Glenpointe
400 Frank W. Burr Blvd.
Teaneck, NJ 07666
Tel. (201) 801-0050 Fax (201) 801-0441

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 3864-0531 Fax (03) 3864-4114

INPUT®

How to Find and Manage the Market Opportunities in Federal Processing Services and Systems Operations...

Federal Processing Services/Systems Operations Market, 1989–1994

This report will help you:

- FIND specific agency opportunities in this market
- DEVELOP marketing strategies and services that will bring agency business
- IDENTIFY competitors and potential teaming partners
- REFINE your bidding and pricing strategies to maximize profitability
- IMPROVE agency satisfaction with your services

The report contains:

- Market forecasts through 1994
- Agency requirements and purchasing trends
- Competitive analysis
- Recommendations

Call, fax, or mail your order today to INPUT

to any office listed on the back of this brochure

Develop Your Successful Strategic/Market Plan from Our In-Depth Industry Coverage

The federal government market for processing services and systems operations is experiencing new growth. The federal government's increasing reliance on information technology to improve productivity and accomodate staffing inadequacies provides numerous opportunities for vendors that supply transaction processing, batch, and operational support services.

Federal Processing Services/ Systems Operations Market
Market Analysis and Forecast, 1989–1994
• Historical Perspective • Budgetary Constraints • Software Integration and Productivity Improvements • Artificial Intelligence • Leading Vendors
Federal User Requirements and Trends
• Problems and Issues • Budget and Application Distribution • Agency Perceptions • Acquisition Plans and Preferences • Projected Trends in Processing Services and Operational Support
Competitive Trends
• Vendor Participation • Vendor Market Perceptions • Vendor Contracting Views • Trends • Recommendations
Key Opportunities

This new report from INPUT, *Federal Processing Services/Systems Operations Market, 1989–1994,* shows you where and how to compete in the federal market for operational support. This report is a comprehensive analysis of the factors driving this market's growth, providing strategies needed to succeed in the intensifying competitive environment. It answers the important questions you have about this market.

Why is the federal processing services/systems operation market growing?

This report presents INPUT's analysis of the federal market for processing services and systems operations (operational support). It analyzes how market growth is being encouraged by the increasing versatility of processing services and operational support and the trend towards automation of government operations.

The report identifies the market segments and applications that will grow rapidly and the markets that will experience slower growth. The growth of systems operations is a focus of this report. The report also discusses the factors that will sustain the market despite its maturity and budgetary constraints, including the government's facilities limitations and its efforts to modernize and improve efficiency.

How do I market to the various agencies?

Vendors in this market need to maximize their marketing efforts towards current and future government requirements in key applications. By analyzing the types of functions government agencies are contracting out, this report helps to focus your product and service offerings in high growth segments.

INPUT®

1953 Gallows Road, Suite 560, Vienna, VA 22182
703-847-6870 Fax 703-847-6872

Gain Insight into the Federal Processing Services/ Systems Operations Market

The federal government's reliance on information technology to improve productivity and overcome staffing inadequacies has spurred growth in the processing services and systems operations markets. INPUT's forecast for the next five years calls for the market to continue its growth despite budget restrictions and regulatory conditions impacting the federal marketplace.

The just-completed report on the *Federal Processing Services/ Systems Operations Market, 1989-1994* focuses on the current responses of the federal agency and vendor communities to issues, trends, and changing needs of this market. It also analyzes the government's continued requirements to support a wide range of applications to develop recommendations to vendors for better focus of their product offerings.

To receive your copy of this informative report, please mail or fax the enclosed order form, or call INPUT at (415) 961-3300.

Best regards,

John E. Frank

John E. Frank
President
INPUT, INC.

ORDER FORM

YES! I need to find and manage the market opportunities in federal processing services and systems operation! I need INPUT's report on the *Federal Processing Services/Systems Operations Market, 1989-1994!*

I understand that I may call my order in, fax it to you at the number below, or send this form in by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report on ***Federal Processing Services/Systems Operations Market, 1989-1994.***

☐ I want to pay $1,350, a savings of $150 off the regular price. I'm ordering before April 30, 1990.

☐ I'm ordering after April 30, 1990, for the regular price of $1,500.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ____________ to cover the cost of my order.

☐ Charge $____________ to my American Express card:
Card # ______________________________
Exp. date ____________
Signature ______________________________

☐ Bill my company for $ ____________ on purchase order number ____________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:	Accepted By INPUT:
Organization	Signature
Name	Name
Title	Title
Address	Date
Telephone	
Signature / Date (SEE TERMS OTHER SIDE)	

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

GFFM 390

CONDITIONS AGREEMENT

INPUT

The report also explores marketing and sales issues unique to the federal government, including procurement policies and preferences, vendor selection criteria, and planned uses of contractor services in operational support.

What are the most appropriate pricing strategies in this market?

Successful pricing strategies are vital to capitalize on agency opportunities in this market. The report includes recommendations on how to improve margins and gain competitive advantage through cost controls and alliances.

The report identifies the leading vendors that have established significant shares of the federal government's processing services and systems operations market. Hardware, software, and service vendors can use the report to identify specific agency opportunities, possible teaming partners, and appropriate bidding strategies.

Features and Benefits of this Report

This study is based on interviews with agency officials and vendor representatives, as well as data collected from published government sources. (Agency program data and updated vendor information was collected by INPUT during 1989.)

The survey illustrates the views, in both the government and the industry, regarding:

- Current and future agency use of processing services and systems operations
- Leading vendors and performance evaluations
- Strategies
- Issues and trends

Federal Market Pressures

- Staff shortages
- Labor-intensive process
- Mission contracting
- Cost-cutting
- High attrition

Federal Processing Services/Systems Operations Market, 1989–1994 is a complete assessment of agency requirements, competition, and evolving trends and issues. It provides market intelligence to marketing and planning executives to assist them in developing successful marketing plans, assessing capabilities, and analyzing the competition in contractor-supplied processing services and systems operations.

Call, fax, or mail your order to INPUT
to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

U.S. Information Systems and Services Industry

Federal Information Systems and Services Program

Federal Information Systems and Services Program

FEDERAL MARKET OPPORTUNITY

The federal government will spend more than $21 billion dollars annually on computer systems, computer services, software, and communications by 1994.

The majority of these dollars will be won by vendors well informed about federal procurement plans and practices. INPUT's Federal Information Systems and Services Program can help you win federal business.

PROCUREMENT ANALYSIS REPORTS

These reports, issued monthly, identify and track individual defense and civil agency procurement opportunities up to five years in advance of RFP release; they are indexed by agency, fiscal year of start, and system/service mode.

PROCUREMENT ANALYSIS REPORTS

Agency Name
Program Title
Funding by Fiscal Year
Procurement Schedule Target Dates
- Draft
- CBD Announcement
- Pre-Bid Conference
- RFP-RFQ Release
- Bid Due Date
- Award Date

Description of Program
Systems/Services to Be Acquired
Contract Types
Contract Duration
Contracting Office (Name and Address)
Program Office (Name and Address)
Background/Function
Analysis
Acquisition Plan
Awards to Date

MARKET ANALYSIS REPORTS

Each Market Analysis Report contains five-year market forecasts.

Federal Computer Security Market
Analyzes the market for hardware, software, and services to support federal security concerns. Assesses present and future compliance with the Computer Security Act of 1987, and its impact on market trends.

Federal Telecommunications Market
Assesses the market for federal telecommunications products and services a year after the award of FTS 2000. Analyzes the success of the contract, its effect on other agency contracting activities, and those telecommunications market areas which remain competitive.

Department of Veterans' Affairs Information System Market
Discusses the effect of transition to Departmental status on IS activities, including the reorganization of key executive positions. Identifies the interoperability needs of agency mission areas (including burial services, benefits, and medical support), the growth of EDI, and the redesign of agency administrative systems.

Federal Computer Equipment Maintenance Market
Assesses the trends in this market in light of technology advances, reduced support requirements, and special issues relating to microcomputer maintenance. Addresses the effects of industry consolidation, the federal third-party maintenance market, and cross-vendor maintenance agreements.

Federal Professional Services Market
Forecasts the professional services market, including consulting, education, training, programming and analysis, systems operations (facilities management), and additional areas.

Federal Systems Integration Market
Forecasts the federal systems integration market by component. Analyzes agency trends toward fewer and larger procurements and the resulting impact on teaming arrangements among vendors.

INPUT®

ISSUE PAPERS

Federal Financial Systems Market
Identifies the growing trend toward federal certification of financial systems, including the Joint Financial Management Improvement Program, and its effect on hardware vendors.

Federal Education and Training Market
Expands on the subsegment of federal professional services to assess the impact of computer-based training and new training approaches on vendor sales prospects.

FEDERAL SYSTEMS AND SERVICES CONFERENCE

This two-day conference, held in Washington, D.C., covers INPUT federal market research. Expenditure forecasts are presented together with presentations by government and industry leaders on trends, policies, and methods.

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data. It handles FOIA requests (at nominal additional fees).

Federal Information Center
Clients have access to INPUT's Federal Information Center which houses hundreds of agency planning, budget, and procurement documents, and a wide array of gevernment-related research sources and all other INPUT program reports.

INPUT Client Conference
This annual conference for all INPUT's clients is on key strategic industry trends and developments. INPUT forecasts are presented and discussed. Attendance at this conference is available at a reduced fee for full subscribers.

PROGRAM DESCRIPTION

PROCUREMENT ANALYSIS REPORTS

- Defense & Civil Agencies
- Indexed by Agency, Fiscal Year Start, and Systems/Service Mode
- Monthly Reports

MARKET ANALYSIS REPORTS

- Federal Computer Equipment Market
- Department of Veterans Affairs Information Services Market
- Federal Computer Security Market
- Federal Professional Services Market
- Federal Systems Integration Market
- Federal Telecommunications Markets
- Federal Financial Systems Market
- Federal Educational and Training Market

FEDERAL SYSTEMS & SERVICES CONFERENCE

- 2-day, Washington, D.C.

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- Client Conference
- Federal Information Center

RELATED SERVICES

Custom research and consulting projects can provide agency research, competitive analysis, acquisition search, contract award research, agency selection practice assessment, and specialized forecasting.

Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

Federal Information Systems and Services Program (FISSP) 1990 Program

Procurement Analysis Reports (PAR)	Market Analysis Reports (MAR)	Client Support
Tracks Individual Procurement Opportunities up to 5 Years in Advance of RFP Release	Federal Computer Security Market	"Hotline" Inquiry Service
Describes Specific Mission requirements and Related Programs	Federal Computer Maintenance Market	Access to INPUT's Information Centers for Federal Information
List Prior Awards	Federal Professional Services Market	Annual FISSP Client Conference
Identifies Points of Contact for Pre-Sale Marketing	Federal Systems Integration Market	. . . .
Indexed by Agency, Fiscal Year, and Systems/Service Mode	Federal Telecommunications Market	INPUT Annual Executive Conference (optional; reduced fee)
Defense and Civil Agencies	Department of Veterans Affairs Market	
<u>New Service</u> Redesigned PARS Index on Floppy Disk		

INPUT's 1990
Federal Information Systems and Services Program

Yes!
Please enter my order as described:

Subscription to INPUT's Federal Information Systems and Services Program (FISSP) at the fee of $25,000.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning ____________. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

❑ Enclosed is my check in the amount of $________________.

❑ Bill my company on purchase order number _____________ in the amount of $________________.

Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

1288S-FISSP 12/89

INPUT®

If You Need to Know What's Going On in Government Systems Integration . . .

- ▲ Pressure to redesign aging systems
- ▲ Changing agency requirements
- ▲ Pressure to share risks
- ▲ Pressure to do more with less
- ▲ Attacks on the *concept* of systems integration

You need INPUT's latest comprehensive
The *Federal Systems Integration Market,*

You can have a report that explains in detail the crucial dynamics of the Federal Systems Integration market today.

And if you act before February 28, 1990, you'll pay $150 less than the standard list price— a savings of 10%!

Federal Systems Integration Market, 1989-1994
• Market Analysis and Forecast • Agency Requirements • Systems Integration Vendors • Key Opportunities
Agency Perspective
• Hardware Systems • Systems Applications • Agency Perceptions • Case Studies of Contracts • Acquisition Plans and Preferences • Projected Trends
Vendor Perspective
• Vendor Participation • Vendor Market Perceptions • Vendor Contracting Views • Trends

A brand new revision of INPUT's respected survey, *Federal Systems Integration Market, 1989-1994*, gives executives who must sell into this market invaluable intelligence tailored specifically to their needs—and to the needs of a gigantic market in a state of flux.

The rules for successfully penetrating this market will never be the same. INPUT's new report tells you how they've changed, and helps you turn those changes to your advantage.

Of course the report gives you a broad market overview, seasoned with the combined experience and expertise of a research staff that knows more about how Washington works than any other computer market research firm. But the report also gets down to the nitty gritty, giving you detailed analyses of:

- What the requirements of the different agencies are today, and how they are likely to change over time;
- Who the major players are in federal systems integration, and how they can give flexible competitors new opportunities for increasing market share; and
- When and how the major contracts will be put out to bid, and who will be involved.

And that's not all...

Six Ways the Market Is Changing

The report also details the six major pressures on the federal systems integration market, and explains how they are acting in concert to change the way you have to do business:

- **Pressure for Improved Productivity**—The overall constraints of the Gramm-Rudman budget axe and the increasing scrutiny of information systems expenditures could seriously affect you. The report offers an analysis.

INPUT®

1953 Gallows Road, Suite 560, Vienna, VA 22182
703-847-6870 Fax 703-847-6872

Dear Colleague:

Marketing systems integration products and services to the federal government just got a whole lot easier.

INPUT recently released the newest edition of its respected survey of the Federal Systems Integration Market, 1989-1994. This publication is written for just one audience: marketers who must master the intricacies of this evolving market. The report clarifies the complex trends, changing policies, and shifting growth rates of government systems integration—and then offers clear recommendations for future action.

Systems integration is growing fast. In fact, it is one of the star segments of the government market. But the influence of budgetary concerns, new policies, scarce personnel, and changing agency requirements make the market's growth anything but easy to exploit.

INPUT's report offers guidance: timely data, some difficult-to-obtain market intelligence, and a lot of clear recommendations for making the most of this vast opportunity.

So order the report today. Make the most of it!

Yours sincerely,

John E Frank

John Frank
President, INPUT INC.

ORDER FORM

YES! I nee to know what's going on in government systems integration! I need INPUT's report on the *Federal Systems Integration Market, 1989-1994!*

I understand that I may call my order in, fax it to you at the number below, or send this form in by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report on ***Federal Systems Integration Market, 1989-1994.***

☐ I want to pay $1,350, a savings of $150 off the regular price. I'm ordering before February 28, 1990.

☐ I'm ordering after February 28, 1990, for the regular price of $1,500.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:
Card # ____________________________________
Exp. date ____________
Signature ____________________________________

☐ Bill my company for $ ______________ on purchase order number ____________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:	Accepted By INPUT:
Organization	Signature
Name	Name
Title	Title
Address	Date
Telephone	
Signature Date	
(SEE TERMS OTHER SIDE)	

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

GSI7 1/90dm

CONDITIONS AGREEMENT

INPUT

INPUT

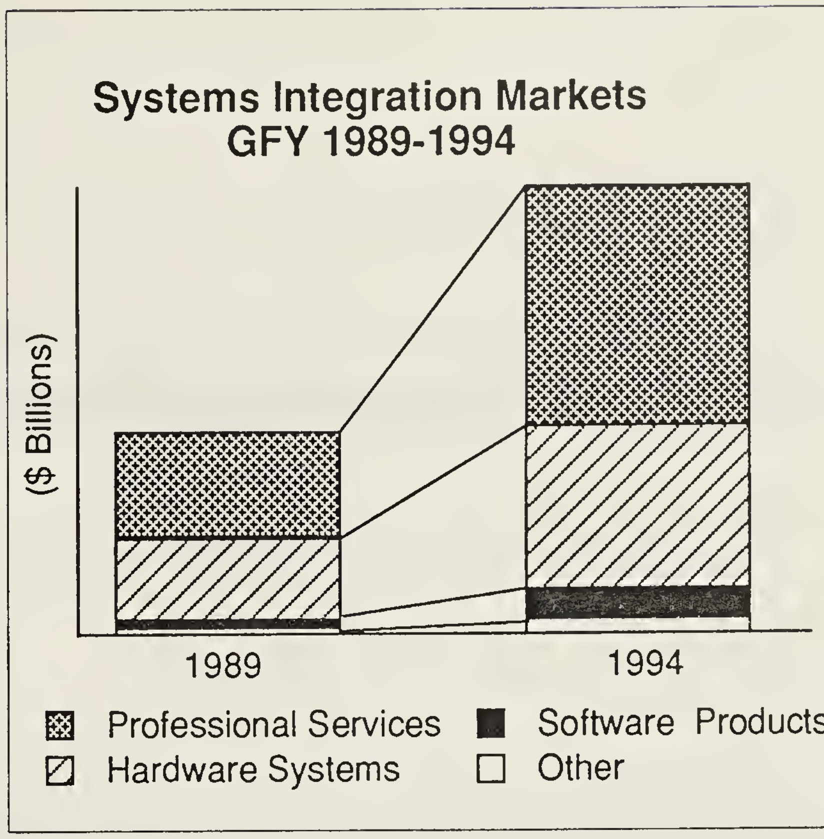
survey, 1989-1994

- **Pressure to Redesign Aging Systems**—Government hardware and software systems are patchworks with no integrated design. That means tremendous opportunities for systems integration work, which the report analyzes in some detail.
- **Pressure to Overcome Staff Shortages**—Government agencies are having a hard time hiring and retaining qualified technical staff, so they must offload technical work onto the private sector. INPUT's report discusses how you can turn this trend to your advantage.
- **Pressure to Maintain Fair Competition**—The entire process of awarding contracts has slowed significantly. INPUT offers some insight on how to avoid the worst delays, and how to minimize their impact on your company.
- **Pressure to Share Risks**—Agencies now want vendors to assume some of the financial risk of large systems integration contracts. The report analyzes how this problem could affect your operations, and offers guidelines on risk-sharing.
- **Pressure to Justify Integration**—Recently, the GSA characterized systems integration as a "Grand Design" and suggested that it would not work. INPUT surveys the market's response.

How To Cash In

The game has definitely changed. There's a new emphasis on project teams, joint ventures, subcontracting, budgeting, and project management. And above all, there is an overwhelming need for vendors to understand the details of the procurement process and how they can affect the bottom line.

Executives that understand how all of these changes are working to change their businesses can make intelligent decisions in the new Federal systems integration market, which is forecast to grow at a rate significantly faster than other technology markets over the next five years.



OVERALL GROWTH is useful information, but knowing which segments are growing fastest can help government marketers more. INPUT's report gives differential growth rates for the most important market segments.

And INPUT's *Federal Systems Integration* report gives you all the information you need to make those decisions today.

Why not fill out the enclosed order form and send it in today?

Call, Fax, or Mail Your Order to Any INPUT Office
listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

GSI7 1/90

Identify and Assess Opportunities in the Rapidly Changing DLA Market...

Defense Logistics Agency Information Services Market

This report will help you develop:

- FORECASTS for the market opportunities at DLA for the next five years by understanding the factors affecting DLA information systems modernization
- COMPETITIVE STRATEGIES in this market based on a thorough knowledge of the competitive environment—leading suppliers, shares, and strategies
- Sales approaches to the DLA that take into account the agency's procurement policies, procedures, and vendor preferences
- MARKETING PLANS that consider major initiatives, acquisition plans, and budget trends

This report contains:

- Market forecasts through 1995 for major market segments
- Procurement procedures and trends
- Budget trends and other funding issues that will impact the market
- Recent and upcoming initiatives
- Complete background and organization of the DLA

Call, fax, or mail your order today to INPUT

to any office listed on the back of this brochure

The Key to Success in DLA Information Strategic Information on Acquisition Plans and Trends

This new study, *Defense Logistics Agency Information Services Market*, was undertaken to keep you up to date with the rapid changes in DLA information systems acquisition practices.

Defense Logistics Agency Information Services Market
• Systems Operations • Telecommunications • Software Products • Professional Services • Processing Equipment • Computer Equipment • Office Information Systems • Electronic Data Interchange (EDI)
Agency Perspectives
• Agency Overview • Major Information Systems Acquisition Plans • Acquisition Plans and Procedures • Vendor Preferences • System Integration Trends • Centralized/Decentralized Directions • Use of IS Vendors
Vendor Views
• Contracted Services Changes • Contract Functionality • Contracting Views • Marketing Perceptions

We Unravel the Opportunity

The report focuses on providing you with a clear picture of the agency—its organization, mission, and directions—along with strategies on how to plan for and conduct business in this market. This report gives you the information you need to establish successful marketing strategies and to select addressable opportunities in DLA information services. The report summarizes the major DLA initiatives and programs and the markets they will affect.

The report examines agency requirements, preferences, and perceptions that impact contractors of information systems and services. Current DLA purchasing patterns and procedures are also covered in the report.

We Provide Hard Analysis of the DLA Market

The report provides a comprehensive market analysis of the DLA's potential. We forecast the information services market by delivery mode, and identify the critical market issues and budgetary and economic trends that are guiding market growth. Special attention is devoted to analyzing how the agency is striving to modernize in the face of continuing budget cuts. User trends, such as increasingly decentralized computing, are also examined.

INPUT®

1953 Gallows Road, Suite 560, Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

Strategies on Marketing to the Defense Logistic Agency

Vendors providing information technology products in the federal marketplace closely watch the actions of the Defense Logistics Agency. This agency has been the focus of many vendors' attentions because of its avowed intention to modernize its information systems agencywide. The agency originally envisioned a single large integration effort that drew internal and external criticism. Now, Logistics Systems Modernization will be accomplished incrementally, in accordance with continuing budget constraints. INPUT's forecast offers insight into the agency's revised spending plans over the next five years.

Just completed, the *Defense Logistics Agency Information Services Market* focuses on the changes in acquisitions of information systems in response to the agency's new strategies for implementing the Logistics Systems Modernization Program (LSMP), and DLA's resulting new internal organization. The report identifies market issues, trends, and agency requirements that impact contractors in establishing or revising their marketing strategies for penetrating this agency.

To receive your copy of this informative report, please mail or fax the enclosed order form, or call INPUT at (415) 961-3300.

Best regards,

John E Frank

John E. Frank
President, INPUT, INC.

A NEW REPORT FROM INPUT

Identify and assess Opportunities in the Rapidly Changing DLA Market...

Call, Mail or Fax Your Order Today

Order Form

INPUT's Research Studies

Yes!
Please enter my order as described:

Defense Logistics Agency Information Services Market report at the fee of $1,500

Take off $75 if check included with order!

TERMS OF PAYMENT
Payment in full is due within 30 days of invoice date.

❑ Enclosed is my check in the amount of $________________.
❑ Bill my company on purchase order number ______________ in the amount of $________________.
❑ Charge $______________ to my American Express #______________________.
Exp. date ________________ Signature _____________________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

CONDITIONS AGREEMENT
The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1953 Gallows Road
Suite 560
Vienna VA
22182
(703) 847-6870
Fax (703) 847-6872

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

Accepted By INPUT:

Signature

Name

Title

Date

GDLA 1/90-dm

INPUT

INPUT®

Services—

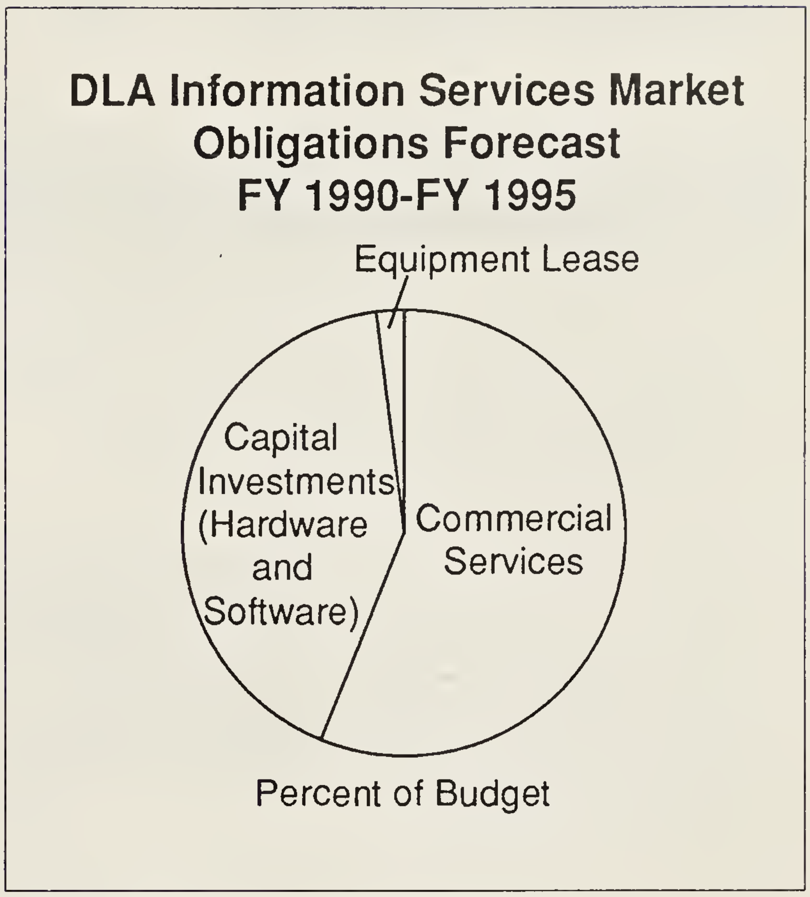
The report provides forecasts for the following vendor service modes at DLA: hardware, software, professional services, integration services, systems operations, processing services, telecommunications, office information systems, and EDI.

Based on Information From the Field

This report is based on information collected in an extensive INPUT survey of agency representatives and vendors. Data collected from agency and government sources and leading vendors summarizes current status and views on:

- Future use of information systems
- Strategies and market perceptions
- Important vendor characteristics and services

As a comprehensive analysis of the important competitive factors and considerations in the DLA market, this report is an indispensable planning tool to information services executives and managers who want to take advantage of DLA opportunies.



Who's buying, and what they spend, is just one kind of market data provided in this report.

Call, fax, or mail your order to INPUT
to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

GDLA 1/90

INPUT®

If an Objective Analysis of Users' TPM Requirements Would Make Your Job Easier...

- ▲ What level of system availability do users require?
- ▲ What selection criteria do they use?
- ▲ How do they rate TPM compared to manufacturers' service offerings?
- ▲ What is the relative importance of support, response time, and parts availability to users?
- ▲ How important is hardware support? Response time?

...Then INPUT Just Made Your Job Easier

We've just produced a new INPUT report that gives you the best and most comprehensive market intelligence on third-party maintenance available.

Information on how buyers rate third-party maintenance offerings, on what they demand from third-party suppliers, and on what criteria they use to decide who will provide this lucrative service—INPUT's *Analysis of Third-Party Maintenance* gives you all of these powerful competitive tools, and more.

Analysis of Third-Party Maintenance
User Service Requirements—All TPM Users
• TPM Selection Criteria • TPM Contractual Coverage • TPM Services Performance Analysis
User Service Requirements—Large Systems
• TPM Selection Criteria • TPM Contractual Coverage • TPM Services Performance Analysis
User Service Requirements—Midrange Systems
• TPM Selection Criteria • TPM Contractual Coverage • TPM Services Performance Analysis
User Service Requirements—PC/Workstation Systems
• TPM Selection Criteria • TPM Contractual Coverage • TPM Services Performance Analysis

And if you act before April 30, 1990, you'll pay $250 less than the regular list price for the report—a savings of 10%!

INPUT interviewed 178 of the top information systems executives of companies that rely on TPM for service of large systems, midrange systems, and workstations/PCs. Every aspect of the service markets was explored: how the markets are changing; what companies look for in service providers; how they weigh manufacturers versus third parties; how factors like price, quality, system availability, remote service, and others influence the purchase decision; and more.

Reliable Competitive Data for Systems *and* Software

The resulting data has been compiled into a timely, manageable, and coherent distillation of the major competitive factors in TPM today.

Analysis of Third-Party Maintenance is not just a report. It is intelligence organized to give you a weapon for enhancing your products' strengths.

The volume includes the following kinds of competitive information for hardware maintenance and support:

- The relative importance of price and quality in service and support agreements
- Users' demands for system availability, ongoing maintenance, and parts availability, and how TPM companies compare with manufacturers
- The growing requirements for three-shift, 24-hour-a-day contract coverage
- How users decide between TPM vendors and manufacturers for hardware support
- The ever-increasing demands for system up-time, and how TPM companies and manufacturers measure up
- How TPM companies have lost a significant advantage now that several large manufacturers service equipment from other vendors

INPUT®

1280 Villa Street, Mountain View, CA 94041
415-961-3300 Fax 415-961-3966

Dear Colleague:

Could you use information on how third-party maintenance offerings are rated by actual buyers? Would you like to know the selection criteria for TPM buyers today? Would a comprehensive survey of TPM user's requirements be helpful?

INPUT has just released the most detailed and up-to-date report on TPM, *Analysis of Third-Party Maintenance.* In it, we analyze in detail exactly what your users want from a TPM vendor, from the relative importance of price and quality all the way down to the impact of discount programs and various contract coverages.

The report is based on interviews with the chief IS professionals at 178 user companies. But the information in those interviews can spell the difference between success and failure for all TPM marketers, no matter what their size, product orientation, or geographic location.

Why be satisfied with guesswork on these fundamental questions when you can get answers based on a survey and analysis of actual product offerings and competitive intelligence?

INPUT's new report offers you all of that. Order it today.

Regards,

Tom O'Flaherty

Thomas O'Flaherty
Vice President

ORDER FORM

YES! I need objective information on users' requirements for third-party maintenance! I need INPUT's report, *Analysis of Third-Party Maintenance*, today!

I understand that I may call my order in, fax it to you at the number below, or send this form in by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report on ***Analysis of Third-Party Maintenance.***

☐ I want to pay $2,250, a savings of $250 off the regular price. I'm ordering before April 30, 1990.

☐ I'm ordering after April 30, 1990, for the regular price of $2,500.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:
Card # ______________________________
Exp. date ____________
Signature ______________________________

☐ Bill my company for $ ______________ on purchase order number ______________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

Signature

Name

Title

Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

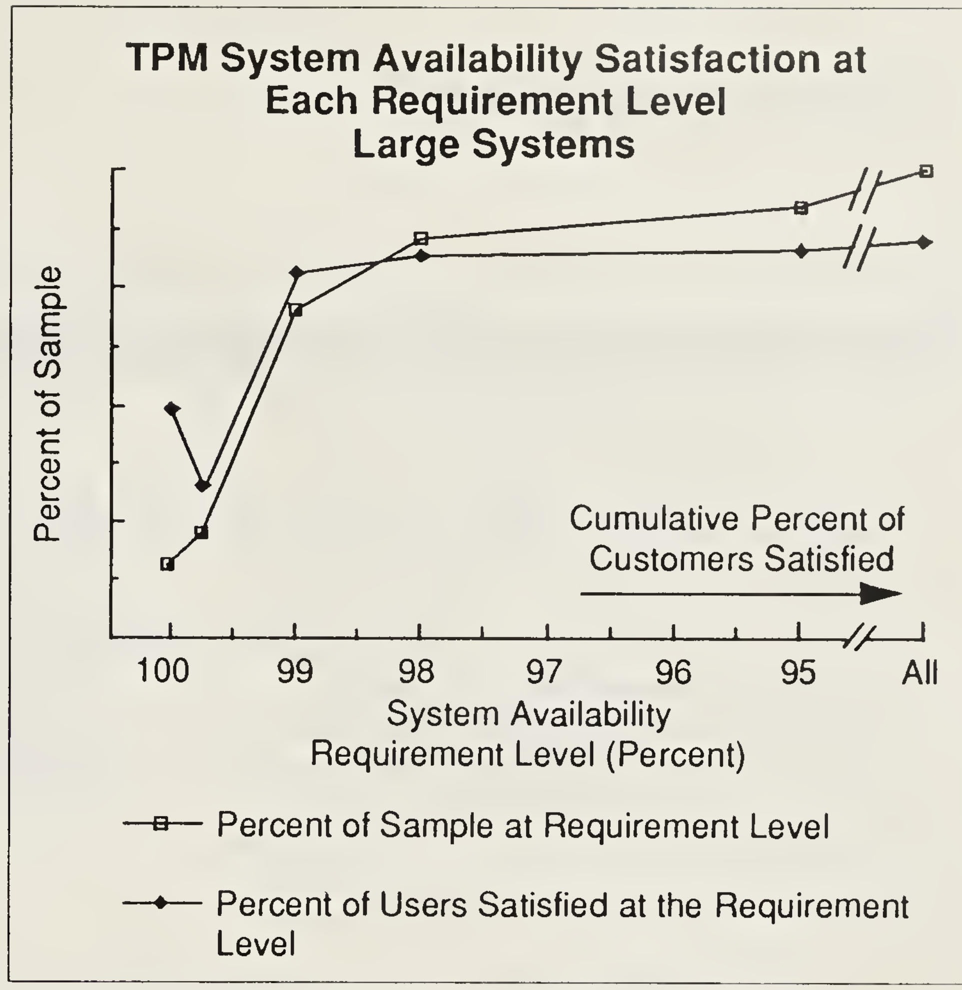
FTUR 3/90

CONDITIONS AGREEMENT

Analysis of Third-Party Maintenance also investigates the increasingly important area of software support, with detailed analysis of:

- What kind of software support do users typically receive, versus what they require?
- How do users rate the importance of ancillary services like training, planning, network design, and network management, and how do they rate the service they get from TPM vendors?
- How willing are customers to use TPM for growth products like applications support, operating system support, and operator education and training?
- How do users respond to existing discount programs, and what impact do these programs have on their willingness to change vendors?

And more on the market and competitive forces that are changing the way you'll do business in the 1990s.



The relative lack of satisfaction among the most demanding customers shows how demands for system availability have skyrocketed. INPUT's report gives you hard data to evaluate the importance of this trend for your business.

How will you have to improve service?
How will you achieve the levels of system availability demanded today?
How will you respond to the entry of large manufacturers into multivendor maintenance?
How will you get the competitive information you need to keep growing in a changing market?

INPUT's *Analysis of Third-Party Maintenance* provides guidance and information on all of these questions, and more. Use the enclosed order form to order your copy today!

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

FTUR 3/90

Only INPUT Has the Answers!

Comprehensive, objective information on what your competitors are doing in large-systems service—that's what you get from INPUT's latest analysis of the service vendors that dominate your market.

And if you act before March 30, 1990 you'll pay $250 less than the regular list price for the report—a savings of 10%!

Entitled *Service Vendor Analysis—Large Systems,* this newest INPUT report profiles the seven giants of large-systems service:

- Amdahl
- Bull
- CDC
- Hitachi
- IBM
- NCR
- Unisys

Service Vendor Analysis—Large Systems
Service Vendor Profiles
• Amdahl Corporation • Bull HN Information Systems Inc. • Control Data Corporation • Hitachi Data Systems Corporation • IBM Corporation • NCR Corporation • Unisys Corporation
Large-Systems Service Vendor Comparative Tables

The report provides complete profiles of these companies, including the history of their efforts in large-systems service, their service demographics, and an investigation of their various service delivery modes.

But the report goes on to offer a comprehensive strategic commentary on each, outlining the pressures on the various vendors, how they are responding, and how these repsonses create opportunities for established providers or new entrants in this fast-growing market.

With the changes in large-systems service, companies have had to reappraise their objectives. Even the seven largest players have begun to reevaluate their direction and strategy.

INPUT's report analyzes the seven giants' service business and plans for change:

- What are the total revenues and service revenues of each company, and the percent change over the last year?
- How are they performing on a revenue-per-employee basis?
- How are each vendor's service contracts structured?
- What kind of billable exclusions does each vendor have?
- What are the hourly rates of each vendor, by time of day, by time of week, and by time of year?
- What kind of multiyear and prepayment discounts does each vendor offer?
- What other kinds of discounts apply, including carry-in, call screens, dollar and unit volume, and so on?
- How many service employees does each company have, including FEs and CEs?

INPUT®

1280 Villa Street, Mountain View, CA 94041
415-961-3300 Fax 415-961-3966

Dear Colleague:

How much value could you get out of detailed and comprehensive analysis of the seven dominant players in the large-systems service market?

How much would it mean to you to be able to know what their contract coverage is, what their revenue per employee is, how they bill their time, and all of the other nitty-gritty details that make large-systems service such a complex and lucrative enterprise?

INPUT has just released the most comprehensive and up-to-date report available on this market, *Service Vendor Analysis—Large Systems*. In it, we analyze the service organizations, delivery modes, and strategic focus of the service organizations of Amdahl, Bull, CDC, Hitachi, IBM, NCR, and Unisys.

The report is based on in-depth studies of individual vendors. The results apply to every company that wants to play in this market.

Why be satisfied with hearsay when you can get fundamental market data based on hard facts and careful analysis?

INPUT's new report offers you all of that. Order it today.

Regards,

Thomas O'Flaherty

Thomas O'Flaherty
Vice President

ORDER FORM

YES! I need answers to all of my questions about what the major players are offering in large-systems service! I need INPUT's report, *Service Vendor Analysis—Large Systems,* today!

I understand that I may call my order in, fax it to you at the number below, or send this form in by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report on *Service Vendor Analysis—Large Systems.*

☐ I want to pay $2,250, a savings of $250 off the regular price. I'm ordering before March 30, 1990.

☐ I'm ordering after March 30, 1990, for the regular price of $2,500.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ____________ to cover the cost of my order.

☐ Charge $____________ to my American Express card:
Card # ______________________________
Exp. date __________
Signature ______________________________

☐ Bill my company for $ ____________ on purchase order number ________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

Signature

Name

Title

Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

FLVA290dm

CONDITIONS AGREEMENT

INPUT

INPUT®

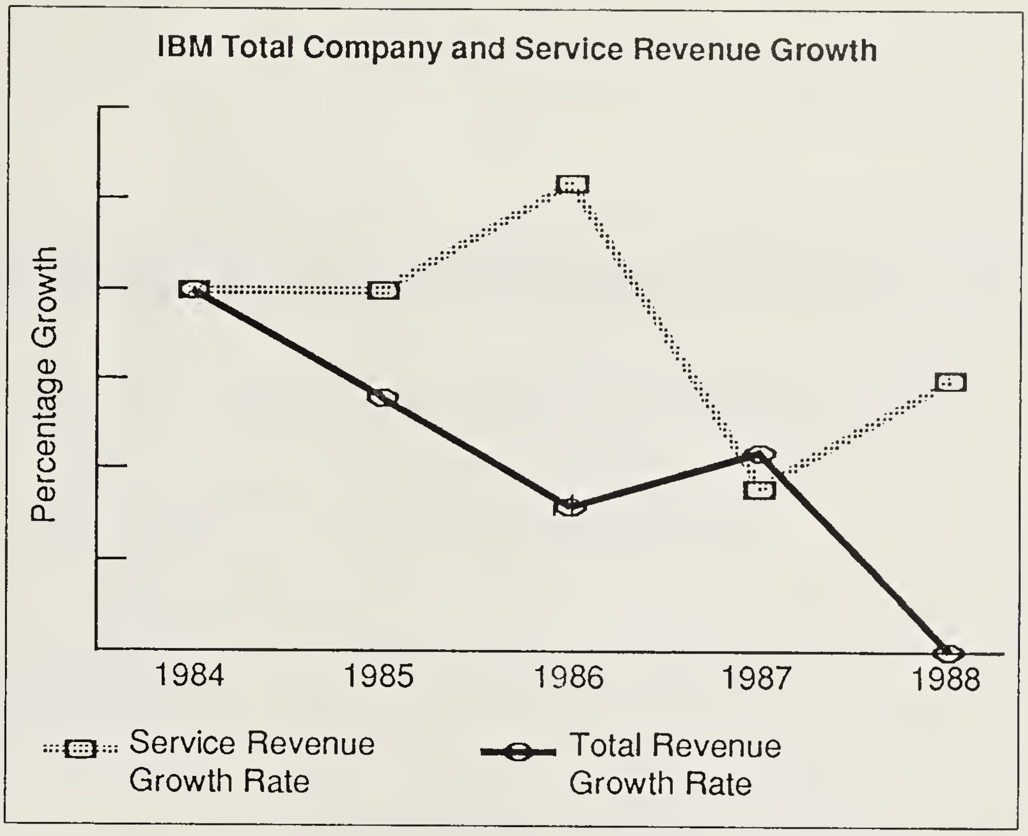
Company Trends and How They Affect You

INPUT analyzes changing market issues, the pressures being brought to bear on the dominant players, and the effects on companies offering service in this environment:

- Where will the strategic focus of each company be during the next few years?
- What does IBM's relatively small proportion of service revenues mean for competitors?
- What are the overall trends for service revenue growth versus total revenue growth?
- What effect will IBM's bold strokes in service mean for other companies' offerings?
- What impacts do the services offered by VARs and OEMs have on the total large-systems service picture?
- How are the service organizations of each company structured?
- How are CAD tools, RF and hardwired data communications, network consulting, and other innovations changing the overall service picture?

And more...

This information can spell the difference between success and failure in determining pricing, developing service offerings, structuring contract coverage, even in knowing when and how far to extend or reduce present service operations.



THE GROWTH RATES of IBM's total revenue versus service revenues are graphed in the above report exhibit. This relationship is crucial. It tells you how much room a company has to manipulate service pricing, and suggests how likely such manipulation might be.

INPUT's *Service Vendor Analysis—Large Systems* puts the resources of one of the most respected authorities on service at your fingertips. The report provides information to assist in planning your company strategy.

So use the enclosed order form to order your copy today!

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

FLVA 2/90

INPUT®

Professionals Who Need The Best Available Analysis of Government Software and Services Markets...

- ▲ Critical intelligence on future trends
- ▲ Acquisition criteria and methods
- ▲ Certification pitfalls
- ▲ The move toward standardization
- ▲ Competition

...Need INPUT's Survey of the Federal

INPUT has just released the best, most up-to-date, and most comprehensive guide to the complex market for government software and services money can buy.

And if you act before February 28, 1990, you'll pay $150 less than the standard list price— a savings of 10%!

Federal Software and Related Services Market, 1989-1994
• Market Analysis and Forecast • Federal Requirements and Trends • Competitive Trends
Agency Perspectives
• Changes in Product/Service Acquisitions • Hardware Platforms • Selection Criteria • Agency Use of Ada • Software Technology Trends • Fourth-Generation Languages • Artificial Intelligence • Impact of Standards and Certification • Acquisition Methods • Testing and Acceptance Procedures • Follow-On Support
Vendor Perspectives
• Vendor Market Participation • Market Perceptions • Selection Criteria • Trends for Specific Products • Factors Impacting the Market • Marketing Strategies

A completely updated revision of the acknowledged "bible" of government software and services marketers, INPUT's report on the *Federal Software and Related Services Market, 1989-1994* is packed with the information you've got to have to make your marketing plans work.

Critical intelligence on trends, agency activity, acquisition criteria and methods, testing and acceptance procedures, competition— the report analyzes all of the factors that define the competitive edge in your business.

And that's not all...

The report also:

- Analyzes the wide-ranging impacts of increased functionality in off-the-shelf packaged software;
- Investigates the increasing perception of agency requirements as having more similarities than differences;
- Details the demands that the government do more with less;
- Highlights current and future plans for agencies' use of Ada;
- Examines the larger impacts of CASE tools, artificial intelligence, UNIX, and other technological developments on the government market as a whole.

And more...

But most important, the report puts all of this information and analysis in the context of how larger government market trends will affect the strategies of software and services marketers— today, and in the immediate future.

INPUT®

1953 Gallows Road, Suite 560, Vienna, VA 22182
703-847-6870 Fax 703-847-6872

Dear Colleague:

The difference between successful and unsuccessful marketing plans in the government software and services arena is good market intelligence, pure and simple.

And INPUT gives you the best market intelligence money can buy.

We have just released the latest edition of our report on *Federal Software and Related Services, 1989-1994,* a compendium of difficult-to-obtain data on market trends, specific agency activity, how acquisition criteria and methods are changing, the impact of increased functionality in packaged solutions, and much, much more.

The report gives marketers who must succeed in this most complex and changeable of all software arenas the hard data they need to sell successfully.

The government software and services market is in a state of flux. Marketers who know where to concentrate their resources are going to prevail.

Be one of them. Order INPUT's report today.

Yours sincerely,

John E. Frank

John Frank
President, INPUT INC.

ORDER FORM

YES! I want the best, most up-to-date, and most comprehensive intelligence on the market for government software and services money can buy!

I understand that I may call my order in, fax it to you at the number below, or send this form in by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ______ copy (copies) of INPUT's report on *Federal Software and Related Services Market, 1989-1994.*

☐ I want to pay $1,350, a savings of $150 off the regular price. I'm ordering before February 28, 1990.

☐ I'm ordering after February 28, 1990, for the regular price of $1,500.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ __________ to cover the cost of my order.

☐ Charge $__________ to my American Express card:
Card # ______________________________
Exp. date __________
Signature ______________________________

☐ Bill my company for $ __________ on purchase order number ______________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

GSR3 1/90dm

CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT

INPUT®

Software and Related Services Market

Tremendous Potential

The 1989 market is already large: $1.97 billion. But by 1994, it is projected to reach $3.8 billion, a compound annual growth rate of 11%.

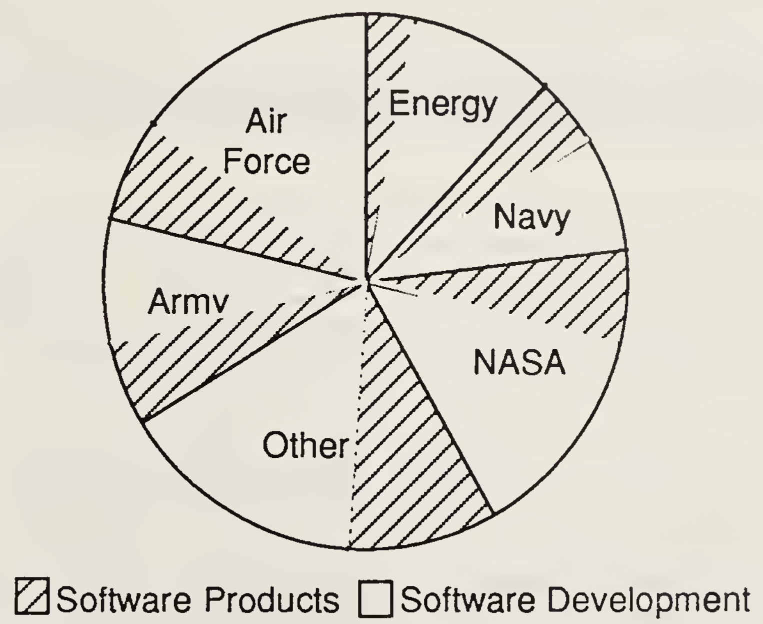
INPUT's report gives you the in-depth information you need to exploit this tremendous potential. Some of the major trends the report examines include:

- A separate and comprehensive forecast focusing on Ada products and services;
- The technical staff shortages plaguing some agencies, and the opportunities this trend opens for all vendors;
- The increasing trend toward software certification, the pitfalls and opportunities it represents;
- The increasing difficulty associated with going it alone in this market, and how various kinds of alliances can open doors for you;
- The increasing inclination toward economical, noncustom solutions in some agencies, in situations where economy and full functionality are in the balance;
- And the growing trend toward standardization, including recent developments in the POSIX and GOSIP markets.

The market for government software and services is growing steadily, but to find the best opportunities there, you need timely and comprehensive market intelligence.

That is the purpose of INPUT's new report on *Federal Software and Related Services, 1989-1994.*

Largest Agency Buyers of Software and Related Services, 1989



THE BIGGEST BUYERS are highlighted in this exhibit from the report. Note the difference between products and development services.

To give you a concise but thorough overview of a rapidly evolving market. To help you make the most of a complex and challenging opportunity. And ultimately, to help you turn the trends in the government software markets to your own advantage.

INPUT is offering you the best tool you could ever have to help you penetrate the government software markets. Why not fill out the enclosed order form and send it in today?

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

If You Need an Edge in the Federal Financial Systems Market...

- ✦ Where are the major active procurements right now?
- ✦ Where are the financial systems growth areas?
- ✦ Will Reform 88 ever affect you?
- ✦ What are the impacts of the JFMIP?
- ✦ Who are the dominant competitors, and what are they doing?

...INPUT Can Show You Exactly Where the Opportunities Are!

The federal financial systems market is one of the government markets with the highest potential for explosive growth.

And INPUT has just published a new report titled *Federal Financial Systems Market, 1990-1995*, designed to give you the competitive advantage that comes with targeted intelligence on agency requirements, legislative impacts, and where the major procurement opportunities are.

At full price, it is an exceptionally cost-effective way to concentrate your resources on only the best available opportunities.

And if you act before November 5, you'll pay $95 less than the regular list price for the report—a savings of 10 percent!

The report contains two kinds of information that you cannot find anywhere else in such a concentrated form. The first is in-depth analysis of this market, including all the factors now working to enhance its growth.

And the second is specific, tactical information on what the procurement plans of the major agencies are, how big they are, when the RFPs are due, and what the selection criteria are likely to be.

Federal Financial Systems Market, 1990-1995
Market Analysis and Forecast
• JFMIP Background • Financial System Standardization Measures • Agency Awareness of Regulations • Impediments to Vendors • Budget Constraints and Software Procurement alternatives • Procurement Opportunities • Market Forecast • Conclusions and Recommendations
Competitive Considerations
• Current Software Vendors • Future Software Vendors • Impact on Hardware Vendors
Key Opportunities
• Financial Systems Opportunities by Agency

The kinds of tactical questions covered in the report include:

- Which seven federal agencies represent the hottest current opportunities for financial software vendors, either at the RFI or RFP level?
- What criteria are used to evaluate financial system vendors, and how do they differ from agency to agency?
- How important are custom programming services to agencies needing financial systems?
- What strategies have Computer Data Systems Incorporated and KPMG Peat Marwick used to sell in the federal market? Why have they been successful where others have failed?
- Which firms not currently on the GSA schedule may become significant competitors in the future, and why?
- How can strategic alliances help you penetrate the financial systems market?

And other questions concerning the types and sizes of opportunities for financial systems procurements by agency.

The Highest Possible Returns

As you know, the laws of supply and demand sometimes do not have the most influence on which agencies buy which financial systems in the federal market.

Other forces, including attempts at standardization, agency requirements, legislative initiatives of one kind or another, attempts at reform, and the constriction of federal budgets sometimes predominate.

Federal Financial Systems Market, 1990-1995 analyzes these forces in detail, bringing to bear INPUT's tremendous research resources and our staff's decades of experience in the federal maze on such questions as:

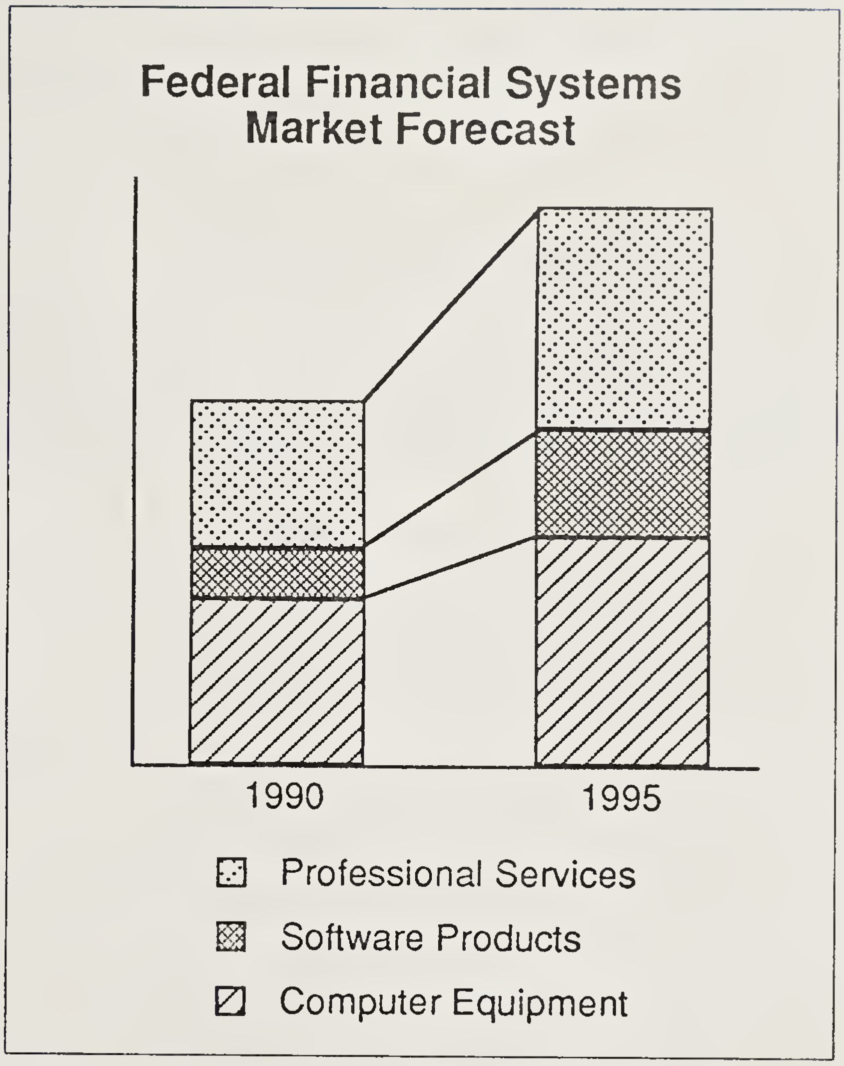
- How big is the market for federal financial systems, and how fast is it growing?
- Which delivery modes (professional services, software, and computer equipment) represent the best growth opportunities?
- Which procurement mode do most agencies use for obtaining core-compliant software?
- How can you use the Joint Financial Management Improvement Program (JFMIP) to help you penetrate this market?
- How big is the market for federal financial systems? How fast is it growing? Which category (professional services, software, equipment) is growing fastest?
- How have GAO audit targets affected the market for financial systems?
- How will the Financial Integrity Act of 1982, Reform 88, OMB Circular A-127, and GAO Title 2 affect your selling in these markets?
- How are some agencies getting around the requirements for core-compliant financial software?

INPUT goes into all of these subjects—and many others—in depth, so that you can understand how the larger market forces are affecting financial systems procurements, and can concentrate your sales and marketing resources where they will yield the highest possible returns.

Concentrated Intelligence

The information in this study represents months of research, including interviews with key agency procurement officers and an exhaustive search and analysis of vast numbers of federal documents related to financial systems procurement. And all of it—surveys, interviews, search, and analysis—have been tempered by our unmatched experience in uncovering opportunities in one of the most complex markets in the world.

The result is five chapters of concentrated intelligence that can help you target the best procurements—intelligence that would be impossible for you to duplicate on your own.



SIZE AND GROWTH RATE DATA for three key segments of the Federal financial systems market are shown in this graph, which is typical of the kind of information contained in the INPUT report.

But you don't have to. Because to get the same results—to get all of the benefits of one of the most sophisticated research efforts ever conducted in the federal market—all you have to do is ask.

So use the enclosed order form to ask for your copy of *Federal Financial Systems, 1990-1995* today.

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, West Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

The Most Comprehensive Overview of the Federal Computer Security Market Available Today . . .

- ✔ Complete Market Analysis and Forecast
- ✔ Trends in Federal User Requirements
- ✔ What the Competition Is Doing
- ✔ Analysis of Legislation and Budget Constraints
- ✔ Where the Opportunities Are

. . . A Competitive Advantage for Federal Computer Security Vendors

You rarely have access to this kind of market intelligence in *any* market, let alone one as complex and volatile as the federal computer security market.

But INPUT has just released a report entitled *Federal Computer Security Market, 1990-1995* that gives vendors access to highly focused research on market and technology trends, federal user requirements, competitive trends, and where current and future opportunities lie for those flexible enough—and well-enough informed—to exploit them.

A report with this much distilled data and analysis would be worth full price to any vendor serious about selling to the federal government.

But if you act before November 30, 1990, you can pay $175 less than the regular list price for the report—a savings of 10 percent!

Changing user requirements, the dictates of six different security watchdog agencies, the contradictory pronouncements of Congress—these all make the security market tough to plan for, tough to understand, tough to penetrate efficiently. But INPUT's report concentrates man-years of research and decades of federal market experience into a sharply focused competitive weapon that helps you do all of this, and more.

Exhaustive

INPUT systematically explores the market, the requirements of users, the activities of competitors, and the opportunities hidden in millions of words of federal reports. We then give you answers to the questions that will have the biggest impact on your success:

- What will the actual effect of the Computer Security Act of 1987 be in an age of tightening budgets?
- Exactly what roles do the GSA, OMB, NSA, NIST, GAO, and PCIE each play in the computer security market?
- How has the move toward more open networking systems opened opportunities for security vendors?
- How has bureaucratic maneuvering reduced the importance of the NSA and NIST staffs dedicated to computer security?
- How big is the market? Where are the real opportunities in a market that is showing a sluggish overall growth rate right now? Where will the future opportunities be?
- What trends in technology and the industry will affect agencies' security requirements through FY 1995?
- What are the major competitive trends in federal computer security?
- How big are the vendors in this market, and how dependent are they on the federal market for their revenues?
- How are teaming patterns changing?

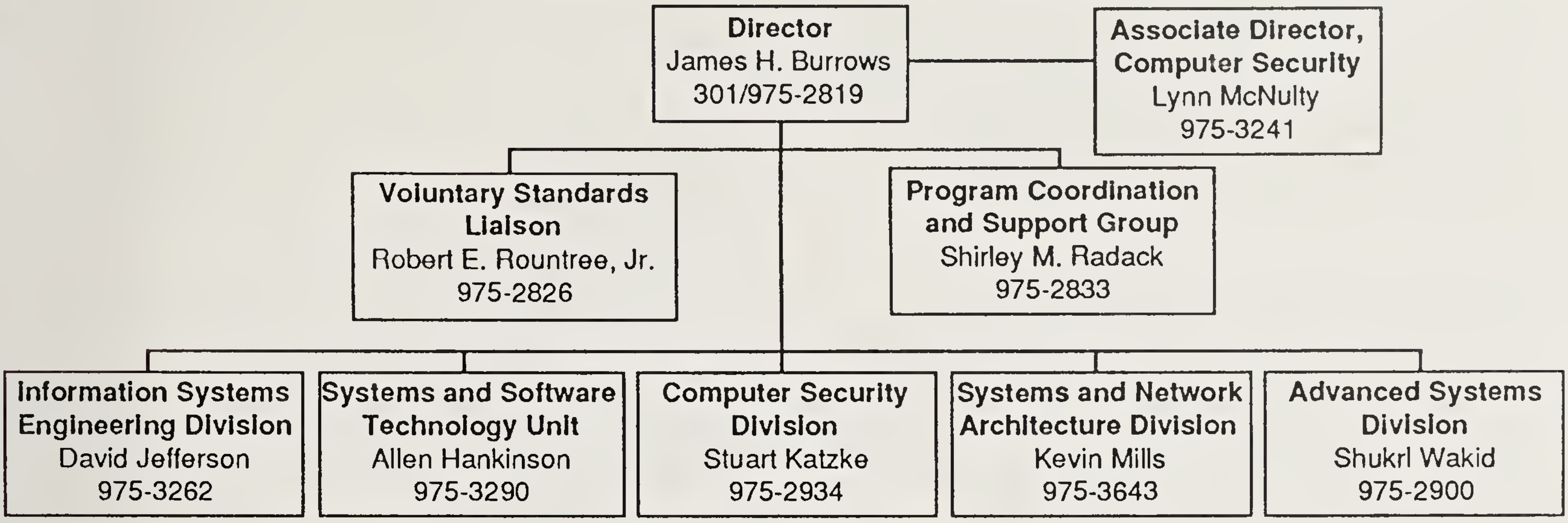
And hundreds of other answers about every aspect of the federal computer security market. This report is an exhaustive survey that leaves readers with information they can use immediately for long-term planning and in their daily marketing and sales efforts.

Practical, Tactical Intelligence

One of the things that sets INPUT's federal reports apart is their provision of information that can be used directly to enhance sales. We combine the decades of experience of our senior staff with targeted survey data and thorough research in existing agency documentation to find unexploited opportunities. We also use our sophisticated research infrastructure to answer questions about the people and institutions that make your market:

- What are the product selection criteria of the major players?
- What are their acquisition plans now and in the future?
- How important are ease of implementation, training features, price, and the vendor's federal experience in the procurement decision?
- What do the big agencies require from vendors in software, encryption, support, price, hardware, training, and experience?
- What roles will GSA schedules, RFPs, and other procurements play?

National Computer Systems Laboratory



THE NAMES, PHONE NUMBERS, and responsibilities of the key liaison personnel in the National Computer Systems Laboratory are just one example of the kind of detailed, practical intelligence you get in *Federal Computer Security Market, 1990-1995.* This illustrates an INPUT specialty: information for day-to-day use in the market that exists, not abstract theorizing.

- How do large users evaluate vendors' security performance?
- What type of vendors do they prefer?
- What do agencies want vendors to do to improve their products and services?
- What impacts will European computer security standards have on your business, and how can you accommodate them?
- What have the various agencies done and not done to comply with CSA 1987? What kind of opportunities does this afford you?
- What are the likely futures for computer security measures and agency requirements two to five years out?

And more on the specific developments that can give you and your company a competitive edge in a market where good information is more important than ever.

This report has it all. If you need information to help you understand the market as a whole, it's here. If you need intelligence to help you understand your competitors, it's here, too. And if you need analysis to help you understand specific sales opportunities, you can find it here as well.

To duplicate this study would require not just the creation of a highly efficient research machine from scratch, but several years of actual digging through the paper blizzard that hides some of the most lucrative contract opportunities in the federal computer market from view.

But to get the study results requires nothing more than a couple of minutes of your time to specify your order.

Why not take that time now? Fill out the enclosed order form and send it in today.

INPUT®

Call, fax, or mail your order to any INPUT office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT Offices

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

STP

INPUT®

Information Services Industry

Systems Integration Program

Systems Integration Program

SYSTEMS INTEGRATION PROGRAM

Systems Integration (SI) provides a complete solution to a complex information system, networking or automation requirement through the custom selection and implementation of a variety of information products and services. A thorough understanding of the importance and impact of SI on both vendors and users is essential in the dynamic information services market of the 1990s.

The business urgency of large-scale project development, the multivendor requirements of state-of-the-art solutions, the absence of acceptable off-the-shelf solutions, and the user desire for a single vendor interface are all contributing to the shift to the SI approach. In this market the vendor takes responsibility for the overall management of an SI contract and is the single point of contact, responsible to the buyer for delivery of the solution, on schedule, and at the contracted price.

INPUT's Systems Integration Program provides answers to the questions being raised in this rapidly growing and changing market. It is based on over six years of research into this area. INPUT characterized 'System Integration' in 1983 as "the two magic words that could change the whole information systems industry."

Some SI contracts include a requirement for systems operations (SO), where the vendor manages all or part of the user's information processing functions under a long-term contract, with the contractor planning, controlling, managing and operating the system(s) providing service to the user. A special report, *Systems Operations—Opportunity for the 1990s*, was included in INPUT's 1989 SI Program, and forecasts for this market are included in the 1990 SI market analysis report.

MARKET ANALYSIS REPORTS

Systems Integration and Systems Operations Market Analysis
This report examines systems integration (SI) and operations (SO) trends and issues in the U. S. domestic market. SI user expenditures are forecast for the next five years by vertical industry market, by type of SI (application, network and data), and by component (information processing equipment, software packages, professional services and associated services). SO user expenditures are also forecast by vertical industry market as well as by service mode (processing services and professional services). Particular attention is paid to commercial market opportunities, with the federal market treated as one of fifteen vertical markets. The federal market is covered in greater detail in a separate report.

Systems Integration Vendor Profiles and Analysis
This report analyzes vendors within a competitive structure (hardware vendors, professional services firms, communications companies, and aerospace companies), and identifies similarities and differences in a variety of areas. These include: organization, financial characteristics, strategies and markets, capabilities and products. In depth profiles of key vendors, including the industry leaders, are provided.

Image Processing in Systems Integration
This report examines image processing systems integration opportunities. Topics include trends in image technology and the forces driving users to include image processing in application solutions. Applications of this technology in specific vertical markets are identified and a sample of existing projects is examined. The report provides a forecast of user expenditures for SI contracts with major image content, identified by vertical industry and application.

Network Integration
This report examines the forces driving the demand for the integration of diverse networks to serve the total needs of organizations. It examines the integration of data networks as well as voice and data integration. Survey results from advanced network integration projects and assessments of benefits derived by users are also included. The report will project end-user expenditures over a five-year forecast period.

INPUT®

Computer-Integrated Manufacturing
The largest vertical market for systems integration in 1989, the discrete manufacturing industry, is forecasted to retain that position in 1994. This report examines the forces driving computer- integrated manufacturing applications and identifies current vendor strategies to meet user needs. It includes a forecast of the growth of the market, identifies leading vendors and recommends strategies for successful market participation.

CONFERENCES AND SEMINARS

Systems Integration Program Seminar
This seminar is an interactive working session which reviews and discusses the results of current research. Industry developments, client acceptance of SI, and marketing concepts are also discussed.

INPUT Client Conference
The conference updates INPUT's clients on key strategic industry trends and developments, and provides a forum for interaction with senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support form INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours), as well as clarification/amplification of report and presentation data.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS

- Systems Integration and Systems Operations Market Analysis
- Vendor Profiles and Analysis
- Image Processing in Systems Integration
- Network Integration
- Computer-Integrated Manufacturing

SYSTEMS INTEGRATION PROGRAM SEMINAR

CLIENT CONFERENCE

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Visit

RELATED SERVICES

- The Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Europe.
- The Vendor Analysis Program provides company profiles and support data on information services vendors in North America and Europe.
- Custom Research and Consulting projects analyse market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

What You Have To Know To Exploit Systems Integration Electronic Imaging Opportunities . . .

- ✔ What is the size of the systems integration imaging market?
- ✔ How fast will it grow over the next five years?
- ✔ What are the hottest applications in imaging?
- ✔ Who are the leading vendors, and what are they doing right?
- ✔ How are imaging systems being implemented?

. . . That's What INPUT's Newest Imaging Report Gives You!

Imaging.

It's one of the most exciting market opportunities in systems integration right now, outperforming the market as a whole in the United States by a factor of two. But to make the most of this complex opportunity requires sound market judgment based on the best research and analysis money can buy.

INPUT has just published a new report entitled *Electronic Image Processing, 1990-1995*, that distills this U.S. market intelligence into a single volume, giving you a competitive weapon you can use to make informed decisions about imaging product development, strategic marketing, and sales.

But if you act before January 15, 1991, you'll pay just, $1,795 for the report! That's $200 less than the regular list price for the report—a savings of 10 percent!

It's a hot report on a hot topic—for a price that's tough to beat. If you need detailed market intelligence on the opportunities in electronic imaging, this is the report for you.

Electronic Image Processing 1990-1995
Market Forecast
• Market Analysis • Major Markets
Image Technology—An Overview
• Imaging Environment • Imaging Media • Imaging Systems • The Legality Issue • Technology Trends
User Application of Image Technology
• Current Status • Image Technology Applications • Justifying Image Technology • Use Impediments • Systems Integrators
Image Technology Vendors
• Image Processing Business Strategy • Systems Integration Vendors • Image Processing Is Important • Electronic Imaging Alliances • Driving Forces • Inhibiting Factors • Customized Imaging Products • Standards Issue • Markets Served • Leading Vendors
Conclusions and Recommendations

Impact

The systems integration electronic imaging market is changing about as fast as imaging technology, which has taken gigantic strides in the past couple of years. INPUT analyzes these changes, their impacts on your product offerings, competitive positioning, and marketing strategies. The report addresses questions like:

- How big is the systems integration electronic imaging market, and how fast will it grow over the next five years?
- Where are the best growth opportunities *within* imaging?
- What forces other than business competition are driving the imaging market?
- How will the trend toward moving data input closer to the point of origin encourage more product integration?
- How important is price/performance to the imaging system user?

ORDER FORM

YES! I need answers to my questions about how to exploit opportunities in electronic imaging. I need INPUT's new report, *Electronic Image Processing, 1990-1995.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE:
MY ORDER

Send me ________ copy (copies) of INPUT's report, ***Electronic Image Processing, 1990-1995*** at the fee of $1,995.

SECTION TWO:
TERMS OF PAYMENT
(CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:
Card # ______________________________________
Exp. date ____________
Name as it appears on my card ________________________________
Signature ______________________________________

☐ Please invoice my company for $ ______________ on purchase order number __________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE:
AUTHORIZATION

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

SIIR3 12/90 dm

CONDITIONS AGREEMENT

INPUT®
1953 Gallows Road, Suite 560, Vienna, VA 22182 Tel. (703) 847-6870
Fax (703) 847-6872

Dear Colleague:

Imaging is one of the hottest markets in the information industry right now. But to make the most of the opportunities afforded by its rapid growth, you need excellent information on where the markets are headed, which industries are using imaging technology, what users are looking for in imaging vendors, what the most common user objections to actually implementing imaging systems are, and more.

INPUT's new report, *Electronic Image Processing, 1990-1995,* is the distillation of several months of targeted research designed to give you this market intelligence when it can have the greatest impact on your company's success—right now.

The report treats every significant aspect of imaging—user selection criteria, vendor competitive analysis, the role of standards, connectivity requirements, and more—in depth.

And it gives you more than just data. The report offers hard market facts enriched by the analysis of experts who know what kind of competitive tools you have to have to succeed in this market.

Why not put them on your team? Get the facts *and* the informed analysis. Read the enclosed brochure for more details, or just use the order form to get a copy of INPUT's report, *Electronic Image Processing,* today.

Regards,

John E Frank

John Frank
President, INPUT, INC.

- What impact does the lack of standardization have on the market's growth rate?
- What effect does imaging have on customer service?
- How do users evaluate the legal issues raised by widespread document imaging capability?
- How should imaging vendors shape their strategies to exploit future opportunities?

And many other issues regarding broad trends in a technology that is likely to transform the way all types of companies do business.

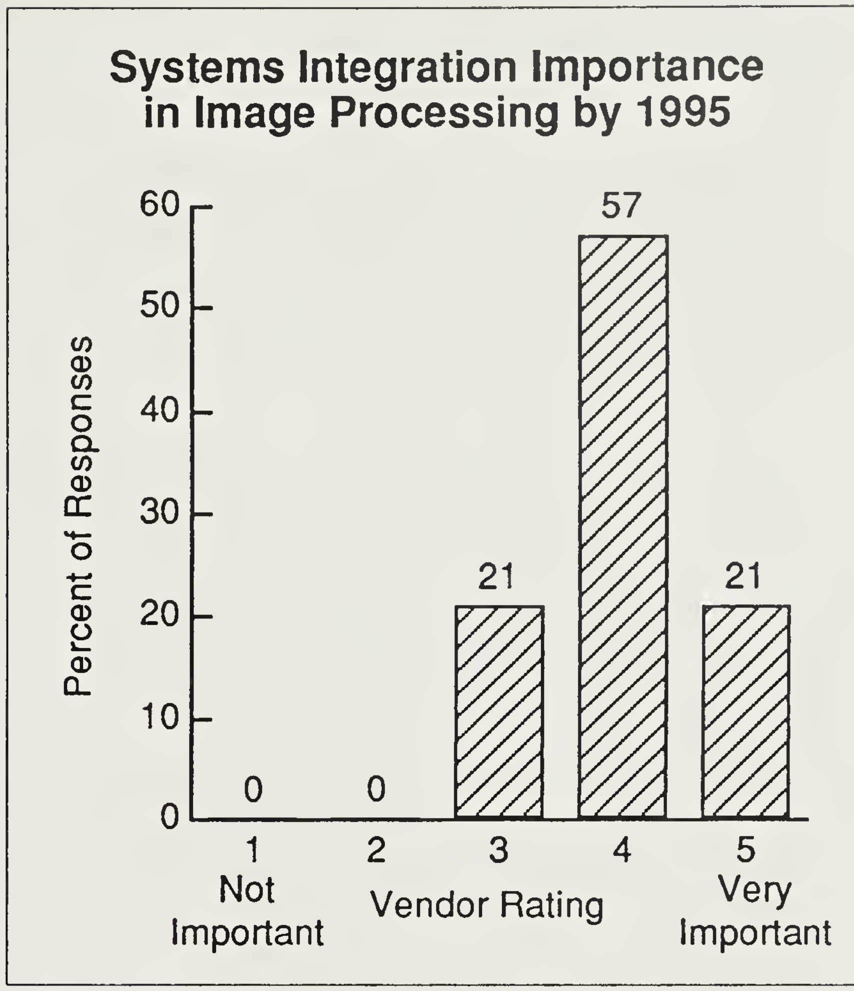
Where the Opportunities Are

In addition to these broader questions, the report, *Electronic Image Processing, 1990-1995*, addresses tactical issues that can make a difference in your day-to-day operations, including:

- Who are the major imaging vendors, and what are they doing right?
- How are companies using OEM agreements, project teaming, VARs, and other kinds of alliances to enhance their market penetration?
- How do users rate the relative importance of image implementation experience, proven imaging architectures, industry knowledge, and imaging software products as selection criteria for imaging vendors?
- What do users say will have to happen to increase their use of imaging technology?
- Which industries have the most aggressive plans for implementing imaging systems?

The report also includes discussions of preferred implementation methods, the relative importance of new versus inserted technology, ratings of various cost justifications, levels of customization, and more.

The first half of the 1990s will see a rapid evolution of opportunity in imaging. That's why INPUT has brought every aspect of its formidable research infrastructure to bear on discovering the crucial market and competitive truths about imaging technology during this period of growth and maturation.



VENDORS AGREE that systems integration will become an important means of implementing image processing in 1995. INPUT's report details the opportunities available to systems integrators.

Our senior research staff has tracked developments in imaging from both the user and vendor perspectives. Their experience and analysis provide some of the best statistical research ever done on this market.

And you get both when you purchase *Electronic Image Processing, 1990-1995*. Use the enclosed form to order your copy today.

INPUT®

Call, fax, or mail your order to any INPUT office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT Offices

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300 Fax (415) 961-3966

New York
Atrium at Glenpointe
400 Frank W. Burr Boulevard
Teaneck, NJ 07666
Tel. (201) 801-0050 Fax (201) 801-0441

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

If You Want to Enter the CIM Systems Integration Market, Or Expand the CIM Side of Your Systems Integration Business...

- ➢ How big is the market, and how fast is it growing?
- ➢ What do users want from CIM vendors?
- ➢ What strategies are your competitors pursuing?
- ➢ What forces are driving the market?
- ➢ How can you benefit?

INPUT Has the Most Comprehensive Report on CIM Available!

Everybody wants to get into CIM these days, but very few companies—users or vendors—are doing it well. It's complicated, it's expensive, and it requires planners and implementers with the CIM knowledge and experience to change the way manufacturing companies operate.

INPUT has just published a new report entitled *U.S. Computer Integrated Manufacturing Systems Integration Market, 1990-1995*. This report gives CIM Systems Integration (SI) vendors a highly concentrated research tool designed to help them understand the broad trends in the market, what users say they need from vendors, and how to shape their businesses to take advantage of present and future CIM SI opportunities.

U.S. CIM Systems Integration Market, 1990-1995
Computer Integrated Manufacturing Market
• Market Environment • The Competitive Challenge • CIM Market Structure
Computer Integrated Manufacturing SI Market Forecast
• Systems Integration Market Structure • Market Forecast
Computer Integrated Manufacturing—The Buyer's Perspective
• CIM Strategies • The Systems Integrator's Role in CIM Systems
CIM Systems Integration Vendors
• Vendor Classification • Leading CIM Systems Integration Vendors • Vendors' Perspectives on CIM and Systems Integration • CIM Systems Integrator Profiles
Summary and Recommendations

A distillation of months of research into a complex and rapidly changing subject, the report cost INPUT tens of thousands of dollars to produce. The list price of $1,995 is a tiny of fraction of that total, and represents an excellent value.

But if you act before January 31, 1991, you'll receive a substantial discount on this report, paying $200 less than its regular list price —a savings of 10 percent!

The CIM market offers tremendous growth opportunities for vendors. But to take advantage of them, you need the best available information on where those opportunities are, and how you can best take advantage of them.

And that's exactly what you get with INPUT's newest research.

Making Sense of CIM

To make better sense of the CIM market, INPU' report breaks it down into three elements: engineering and design applications; production planning activities; and applications that support the plant floor.

Then the report analyzes each of these market elements in considerable detail, offering vendors insights into key questions about large-scale market trends:

- Which are the largest CIM market opportunities today? Which show the greatest potential for sustained growth?
- What forces are driving change in the CIM market?
- What are the major issues facing manufacturers who want to implement CIM strategies?
- How is the focus on JIT and TQC offering SI vendors real opportunities in the manufacturing markets?
- Who are the leading vendors? What have they done in CIM recently? Where do they focus their attention?
- Why, in detail, are users considering CIM?

INPUT®

1953 Gallows Road, Suite 560, Vienna, VA 22182 Tel. (703) 847-6870
Fax (703) 847-6872

Dear Colleague:

CIM offers systems integrators a tremendous market opportunity. But to exploit that opportunity, you have to have the best market intelligence available anywhere.

That's what INPUT's report on *U.S. CIM Systems Integration Market, 1990-1995* gives you. What forces are shaping the market? What do buyers say they need from vendors most of all? Which market segments are growing fastest?

INPUT's report gives you answers to all of these questions, and more.

The *U.S. CIM Systems Integration Market, 1990-1995* gives you the benefit of more than just careful research and informed analysis. When you read this report, you are also benefiting from the years of experience INPUT's experts have in the systems integration market as both users and vendors. They lay bare the fundamental issues, making it easier for you to make the decisions that make such a difference to the success or failure of your company.

Why not put these experts on your team? Get the best information on systems integration and CIM available. Get a copy of INPUT's report today.

Regards,

John E Frank

John Frank
President, INPUT, INC.

ORDER FORM

YES! I have to understand CIM. I need INPUT's report on the *U.S. Computer Integrated Manufacturing Systems Integration Market, 1990-1995.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, ***U.S. CIM Systems Integration Market, 1990-1995*** at the fee of $1,995.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ _____________ to cover the cost of my order.

☐ Charge $_____________ to my American Express card:
Card # ______________________________
Exp. date ____________
Name as it appears on my card ______________________________
Signature ______________________________

☐ Please invoice my company for $ _____________ on purchase order number _____________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

Organization ______________________________

Name ______________________________

Title ______________________________

Address ______________________________

____

Telephone ______________________________

Signature ______________________ Date __________

(SEE TERMS OTHER SIDE)

Accepted By INPUT:

Signature ______________________________

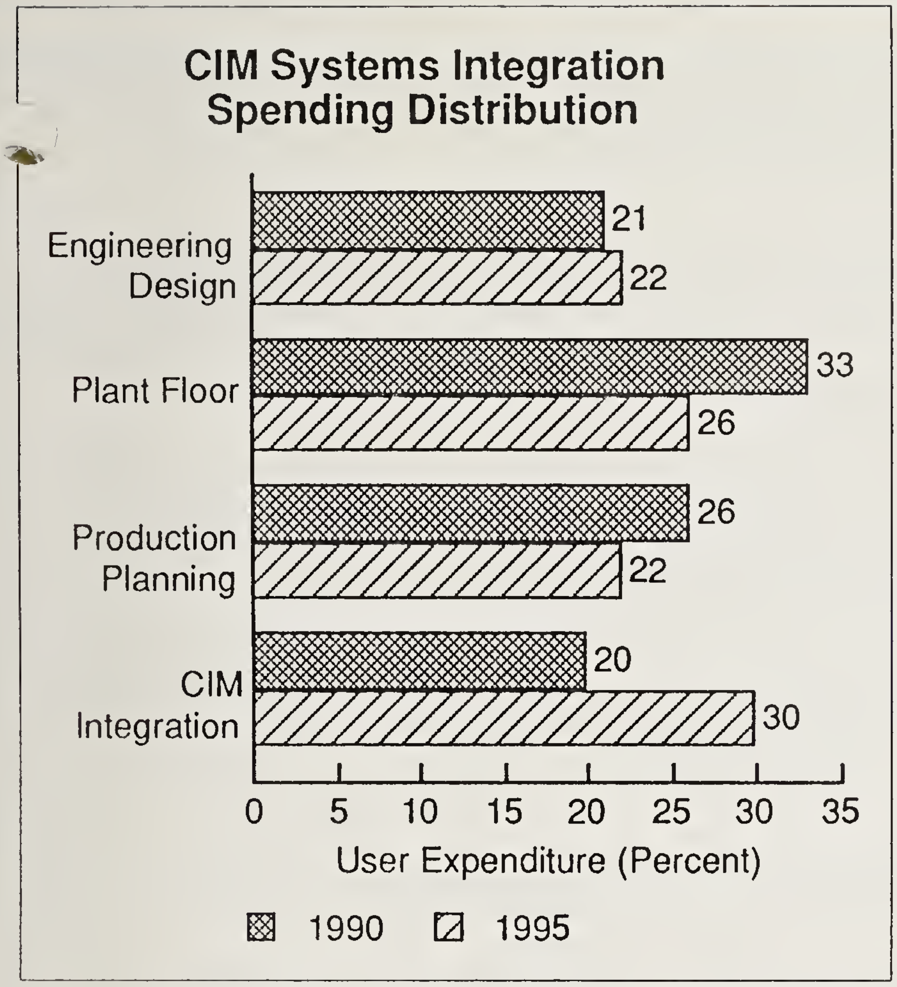
Name ______________________________

Title ______________________________

Date ______________________________

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

SIIR5 12/90



INPUT GOES BEYOND simple market figures and projections give you in-depth analyses of every significant CIM market segment.

In addition, the report discusses how the larger issues of global competition, core business focus, comparisons of discrete vs. process manufacturing, and more can be of value to you in shaping your product and service offerings.

The report also summarizes INPUT's extensive research into user attitudes about CIM, giving vendors a powerful marketing tool and sales aid. The report concentrates on questions such as:

- What are the most important reasons users give for employing systems integrators to implement CIM? How do they rank these reasons?
- What is the distribution of user expenditures for engineering/design applications, production planning activities, and plant floor applications?
- Who are the leading CIM vendors, and why are they so successful?
- How will users try to integrate CIM strategies into existing production environments?
- How do users rate the importance of vendors' CIM experience?
- What do vendors believe are the most important factors for CIM success?
- What do users believe?
- How do users rate their likelihood of using CIM SI vendors, by CIM function?

INPUT®

After investigating all of these questions, the report offers a summary of the study's implications for SI vendors considering the CIM market, with recommendations based on an evaluation of market forces, competitive trends, and strategic and tactical opportunities.

CIM offers tremendous potential, it's true. But for vendors who do not understand the scale of the average CIM project, and how easily such a project can be dragged down by requirements and specifications far outside the original proposal, CIM can be dangerous, too.

Information is what you need to make the most of your CIM opportunities. And information is exactly what INPUT's report on the *U.S. CIM Systems Integration Market, 1990-1995* gives you; targeted market intelligence, penetrating insights into complex markets, and competitive information in a market where every edge helps.

Get the benefit of the combined experience of INPUT's CIM experts. Use the enclosed order form to get your copy of *U.S. CIM Systems Integration Market, 1990-1995* today.

Call, fax, or mail your order to any INPUT office listed on the back of this brochure

INPUT®

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT Offices

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300 Fax (415) 961-3966

New York
Atrium at Glenpointe
400 Frank W. Burr Blvd.
Teaneck, NJ 07666
Tel. (201) 801-0050 Fax (201) 801-0441

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 3864-0531 Fax (03) 3864-4114

SIIR5 12/90

INPUT®

If You Need Help Reducing Risk In Large Systems Integration Projects . . .

- What is the crucial factor for successful program management?
- What kind of change control mechanisms do you need?
- How can you ensure successful communication?
- How do users evaluate vendors' program management skills?

...You Need INPUT's Report on *Program Management in Systems Integration*

A new report from INPUT can give you a significant advantage in one of the fastest-growing segments of the computer industry—the market for systems integration.

And if you act before April 30, 1990, you'll pay $200 less than the regular list price for the report—a savings of 10%!

Program Management in Systems Integration is INPUT's analysis of the increasingly important role program management skills are playing in today's complex systems integration contracts.

The demand for systems integration is growing. Connectivity has become a survival issue in U.S. corporations. Companies are rebuilding their information systems' infrastructures. And applications are growing more complex at the same time they are required to interoperate.

Program Management in Systems Integration
The Systems Integration Process
Vendors' Program Management Processes
• Program Management in the Business Acquisition Process • Program Management Systems • Systems Integration Program Managers
Buyers' Experiences with Program Management
• Vendor Selection and Interface • The Program Management System • The Program Manager • Communication and Change Management • Tools and Methodologies • Buyers' Experience Summary
Conclusions and Recommendations

These trends represent tremendous opportunities for systems integrators. But they also pose significant challenges.

As a result, program management skills are becoming the competitive edge in systems integration.

Critical Elements of Program Management

INPUT's report details the critical elements of a successful approach to program management, including:

- The importance of involving the actual program manager as early as possible in every phase of the contract, from acquisition through implementation to testing and installation;
- The role of risk analysis and management;
- The need to capture the activities involved in typical systems integration contracts as repeatable processes;
- The creation of the necessary sense of partnership between users and vendors;
- The overwhelming importance of communication, and the ways and means of keeping all communication channels open among all parties; and
- The fundamental and growing requirements for qualified, competent, and experienced program managers.

In addition, *Program Management in Systems Integration* gives the results of detailed surveys of large users and vendors of systems integration to allow readers of the report to analyze directly the commentary and reactions of the people actually providing and buying these services.

The report addresses these crucial marketing issues:

- Why do users buy systems integration services?

INPUT®

1953 Gallows Road, Suite 560, Vienna, VA 22182
703-847-6870 Fax 703-847-6872

Dear Colleague:

Could you use detailed intelligence on how to manage the risks of large systems integration contracts? Would you like to know why users go outside to buy system integration contracts, and how they rate the program management components? Would detailed surveys of users and vendors of system integration services help you evaluate your program management requirements?

INPUT has just released the most detailed and up-to-date report on *Program Management in Systems Integration* available. In it, we analyze in detail the increasing importance of program management for today's complex and costly systems integration projects. And we give specific recommendations derived from surveys of the people actually buying and selling these services today.

Why be content with guesswork on this increasingly important activity when you can get answers based on hard data?

INPUT's new report offers you all of that. Order it today.

Regards,

Douglas R. Wilder
Systems Integration Program Manager

ORDER FORM

YES! I need to reduce the risks I run in managing systems integration contracts! I need INPUT's report, *Program Management in Systems Integration* today!

I understand that I may call my order in, fax it to you at the number below, or send this form in by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report on *Program Management in Systems Integration*

☐ I want to pay $1,800, a savings of $200 off the regular price. I'm ordering before April 30, 1990.

☐ I'm ordering after April 30, 1990, for the regular price of $2,000.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ____________ to cover the cost of my order.

☐ Charge $____________ to my American Express card:
Card # ______________________________
Exp. date ____________
Signature ______________________________

☐ Bill my company for $ ____________ on purchase order number ____________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:	Accepted By INPUT:
Organization	Signature
Name	Name
Title	Title
Address	Date
Telephone	
Signature Date	
(SEE TERMS OTHER SIDE)	

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

GSM7 390

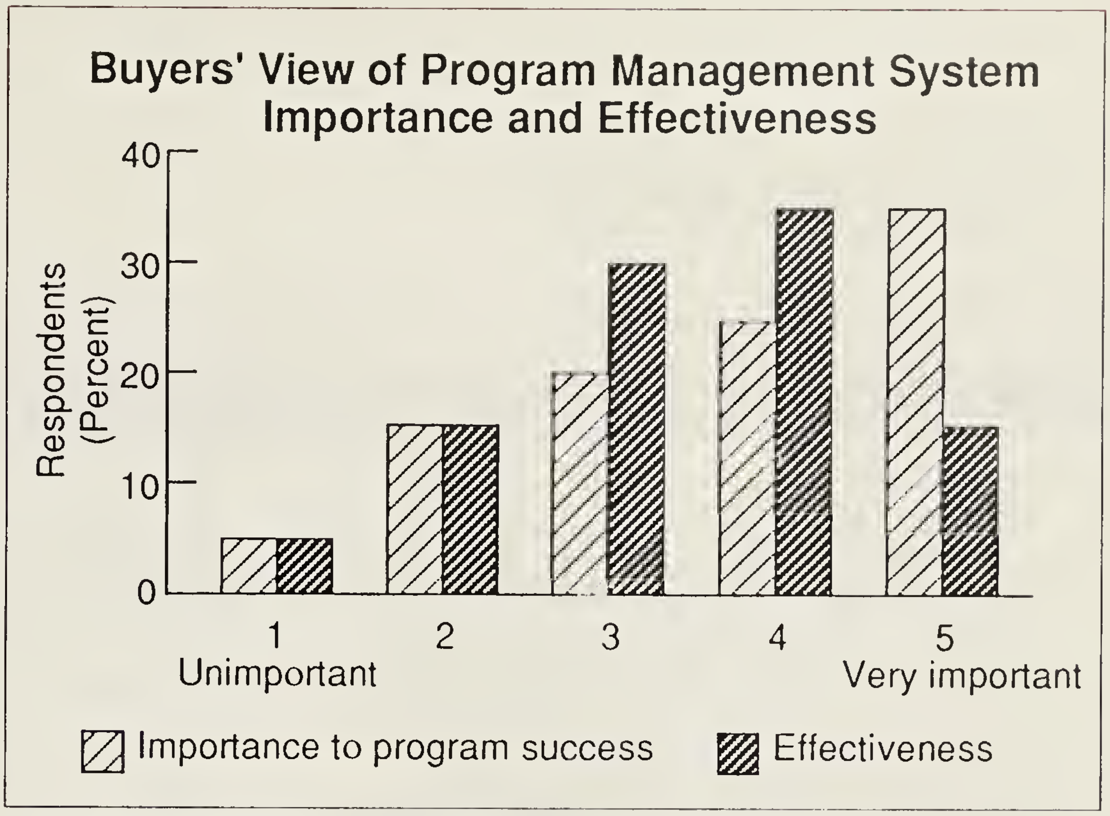
CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

- What role does program management play in the selection of given vendors?
- What is the relative importance of actual users and internal IS organizations in the selection process?
- How can vendors educate their market about the importance of program management tools and methodologies?
- How do users rate systems integration offerings, and how do they evaluate the program management component?

And more…

INPUT also gives readers insight into the size of the total market for systems integration and its projected growth through 1994, as well as the size and growth rate for 14 important vertical industry markets.



HOW BUYERS RATE the importance and effectiveness of program management systems shows the gap between the actual and perceived value of these systems.

Program management has become a crucial component of systems integration contracts. And its importance will only increase as the complexity of these contracts grows.

Put It To Work for You

To round out its intelligence offering, *Program Management in Systems Integration* provides users and vendors both with a comprehensive set of recommendations:

- How to identify and qualify systems integration prospects;
- How to develop proposals even when client specifications are incomplete;
- How to involve the program manager so as to minimize risk and maximize impact;
- How buyers can develop comprehensive specifications to control scheduling and costs;
- How buyers can increase their satisfaction by obtaining details of vendors' program management plans; and
- How buyers can specify the introduction and management of change.

INPUT's report gives you objective, detailed intelligence on program management to help you manage systems integration efforts more efficiently, and to reduce the risks inherent in these projects.

Systems integration offers tremendous advantages. *Program Management in Systems Integration* helps convey them to both vendors and users.

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

Information Services Industry

Systems Integration Program

Systems Integration Program

SYSTEMS INTEGRATION PROGRAM

Systems Integration (SI) provides a complete solution to a complex information system, networking or automation requirement through the custom selection and implementation of a variety of information products and services. A thorough understanding of the importance and impact of SI on both vendors and users is essential in the dynamic information services market of the 1990s.

The business urgency of large-scale project development, the multivendor requirements of state-of-the-art solutions, the absence of acceptable off-the-shelf solutions, and the user desire for a single vendor interface are all contributing to the shift to the SI approach. In this market the vendor takes responsibility for the overall management of an SI contract and is the single point of contact, responsible to the buyer for delivery of the solution, on schedule, and at the contracted price.

INPUT's Systems Integration Program provides answers to the questions being raised in this rapidly growing and changing market. It is based on over six years of research into this area. INPUT characterized 'System Integration' in 1983 as "the two magic words that could change the whole information systems industry."

Some SI contracts include a requirement for systems operations (SO), where the vendor manages all or part of the user's information processing functions under a long-term contract, with the contractor planning, controlling, managing and operating the system(s) providing service to the user. A special report, *Systems Operations—Opportunity for the 1990s*, was included in INPUT's 1989 SI Program, and forecasts for this market are included in the 1990 SI market analysis report.

MARKET ANALYSIS REPORTS

Systems Integration and Systems Operations Market Analysis
This report examines systems integration (SI) and operations (SO) trends and issues in the U. S. domestic market. SI user expenditures are forecast for the next five years by vertical industry market, by type of SI (application, network and data), and by component (information processing equipment, software packages, professional services and associated services). SO user expenditures are also forecast by vertical industry market as well as by service mode (processing services and professional services). Particular attention is paid to commercial market opportunities, with the federal market treated as one of fifteen vertical markets. The federal market is covered in greater detail in a separate report.

Systems Integration Vendor Profiles and Analysis
This report analyzes vendors within a competitive structure (hardware vendors, professional services firms, communications companies, and aerospace companies), and identifies similarities and differences in a variety of areas. These include: organization, financial characteristics, strategies and markets, capabilities and products. In depth profiles of key vendors, including the industry leaders, are provided.

Image Processing in Systems Integration
This report examines image processing systems integration opportunities. Topics include trends in image technology and the forces driving users to include image processing in application solutions. Applications of this technology in specific vertical markets are identified and a sample of existing projects is examined. The report provides a forecast of user expenditures for SI contracts with major image content, identified by vertical industry and application.

Network Integration
This report examines the forces driving the demand for the integration of diverse networks to serve the total needs of organizations. It examines the integration of data networks as well as voice and data integration. Survey results from advanced network integration projects and assessments of benefits derived by users are also included. The report will project end-user expenditures over a five- year forecast period.

INPUT®

Computer-Integrated Manufacturing
The largest vertical market for systems integration in 1989, the discrete manufacturing industry, is forecasted to retain that position in 1994. This report examines the forces driving computer-integrated manufacturing applications and identifies current vendor strategies to meet user needs. It includes a forecast of the growth of the market, identifies leading vendors and recommends strategies for successful market participation.

CONFERENCES AND SEMINARS

Systems Integration Program Seminar
This seminar is an interactive working session which reviews and discusses the results of current research. Industry developments, client acceptance of SI, and marketing concepts are also discussed.

Joint Client Conference
This annual conference updates INPUT's clients on key strategic industry trends and developments, and provides a forum for interaction with senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support form INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "Hotline" Inquiry Service provides fulfillment of 'short-term' research needs (requiring less than two hours), as well as clarification/amplification of report and presentation data.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS
• Systems Integration and Systems Operations Market Analysis • Vendor Profiles and Analysis • Image Processing in Systems Integration • Network Integration • Computer-Integrated Manufacturing
SYSTEMS INTEGRATION PROGRAM SEMINAR
JOINT CLIENT CONFERENCE
CLIENT SUPPORT
• Access to INPUT Consultants • "Hotline" Inquiry Service • On-Site Visit

RELATED SERVICES

- The Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Europe.
- The Vendor Analysis Program provides company profiles and support data on information services vendors in North America and Europe.
- Custom Research and Consulting projects analyse market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

Systems Integration Program—U.S. (SIP) 1990 Program

Annual Report	Reports*	Client Support
U.S. Systems Integration/Operations Forecast and Trends, 1990-1995	SI Vendor Analysis Profiles and Updates	SI Client Seminar
	SI Image Processing	"Hotline" Inquiry Service
	Network Integration	Access to INPUT Information Centers
	Computer Integrated Manufacturing	On-Site Presentation (travel additional)
		INPUT Annual Executive Conference (optional; reduced fee)

* Preliminary Topics

INPUT's 1990
Systems Integration Program—U.S.

Yes!
Please enter my order as described:

❑ Subscription to INPUT's Systems Integration Program (SIP) at the fee of $16,500.

❑ Add on to MAP/FISSP at the fee of $14,500.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning ______________. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

❑ Enclosed is my check in the amount of $________________.

❑ Bill my company on purchase order number ______________ in the amount of $________________.

Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

1288S-SIP 12/89

INPUT®

If Knowledge
(of Network Integration)
Is Power...

- How big is the market?
- How fast is it growing?
- What forces are behind its growth?
- How important is network integration to users?
- What do vendors have to know to succeed?

...Then INPUT Has a Powerful New Report for You!

INPUT has just released a comprehensive new report that carefully analyzes the opportunities and pitfalls in network integration, one of the hottest segments of the computer market today.

Entitled *Network Integration, 1990-1995*, the report focuses on the practical needs of network vendors and system integrators, offering an oasis of hard data to marketers lost in a desert of speculation. It provides firsthand research on important market trends, a factual overview of the evolution of network technology, and a careful analysis of how users' needs for network integration have changed in recent years.

Getting this report at the full retail price could give you a significant competitive edge.

But if you act before July 9, 1990 you'll pay $200 less than the regular list price for the report—a savings of 10 percent!

Network Integration, 1990-1995
Market Forecast
• Network Integration • Network Component of Systems Integration • Major Markets
Integrating Corporate Networks
• Networks Defined • Importance to Business • Trends toward Integration • Benefits of Integration
Network and Systems Integration
• Network Integration Defined • Network Integration Plans • Network Integration and Systems Integration
Conclusions and Recommendations

Cashing In on Major Trends

Major trends in business and technology are pushing companies toward large-scale network integration projects. *Network Integration, 1990-1995* investigates both arenas, including:

- What are the major forces driving businesses toward a greater need for integration services, and how can you benefit?
- How has the flattening of organizational hierarchies made networking more important, and what opportunities has it opened for you?
- Where in the typical business is the need for instant information access growing fastest, and how can you help satisfy that need?
- How have network vendors responded to the demand for standardized integration tools, and how has that changed the integration rules?
- How will the growth of robust public networks, the emergence of virtual network capability, the enhancement of PBX functionality, the rise of intelligent multiplexers, and the tremendous advances in relational data base management and distributed processing affect your business?

INPUT answers all of these questions, and more, offering you unique insights into complex phenomena based on actual surveys of the users and vendors defining this market.

Market Sizes, User Requirements

In addition to analyzing market trends, INPUT's *Network Integration, 1990-1995* focuses on other kinds of competitive information that could spell the difference between success and failure for marketers in this fast-changing competitive arena:

- Exactly how big is the market for network integration?
- How fast is it growing today? How fast will it grow over the next five years?
- How big will it be in 1995?
- How can you avoid confusion between network integration and systems integration, and set customers' expectations correctly?

INPUT®
1280 Villa Street, Mountain View, CA 94041-1194 (415) 961-3300
Telex 171407 FAX (415) 961-3966

Dear Colleague:

The rules of the game are changing in network integration, and as in most other markets, the vendors that know the most are going to make the most.

INPUT has just released a report that is a distillation of tens of thousands of dollars worth—and hundreds of man-hours—of research into one of the hottest markets in the computer industry. Entitled *Network Integration, 1990-1995*, the report is a practical, data-based investigation designed to answer the questions that will influence your success in this highly competitive arena.

Could you use detailed intelligence on exactly how big the market for network integration is, and how fast it is growing now and over the next five years? Would you like to know what kind of vendor capabilities users think are "lockout" qualifications for network integration? Would detailed research into user requirements and successful vendor strategies be helpful to you?

If the answer to any of the above questions is "Yes," then INPUT's new report could fill one of your most pressing needs: the need for factual, timely research based on hard facts and firsthand customer surveys in the network integration market.

In the enclosed brochure, we have a little fun with the old saying about "Knowledge is power." But we're not laughing.

Knowledge of this market *is* power. And INPUT's new report is the single most concentrated source of knowledge on trends and developments in network integration available.

Why be content with guesswork? Order INPUT's report today.

Regards,

Alex Graham

ORDER FORM

YES! I need the power of INPUT's detailed research on network integration. I need INPUT's report, *Network Integration, 1990-1995.*

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me ________ copy (copies) of INPUT's report, ***Network Integration, 1990-1995.***

☐ I want to pay $1,800, a savings of $200 off the regular price. I'm ordering before July 9, 1990.

☐ I'm ordering after July 9, 1990, for the regular price of $2,000.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Charge $______________ to my American Express card:
Card # ____________________________________
Exp. date ______________
Signature ____________________________________

☐ Bill my company for $ ______________ on purchase order number ____________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:	Accepted By INPUT:
Organization	Signature
Name	Name
Title	Title
Address	Date
Telephone	
Signature / Date (SEE TERMS OTHER SIDE)	

INPUT
1280 Villa Street
Mountain View
CA 94041-1194
(415) 961-3300
Fax (415) 961-3966

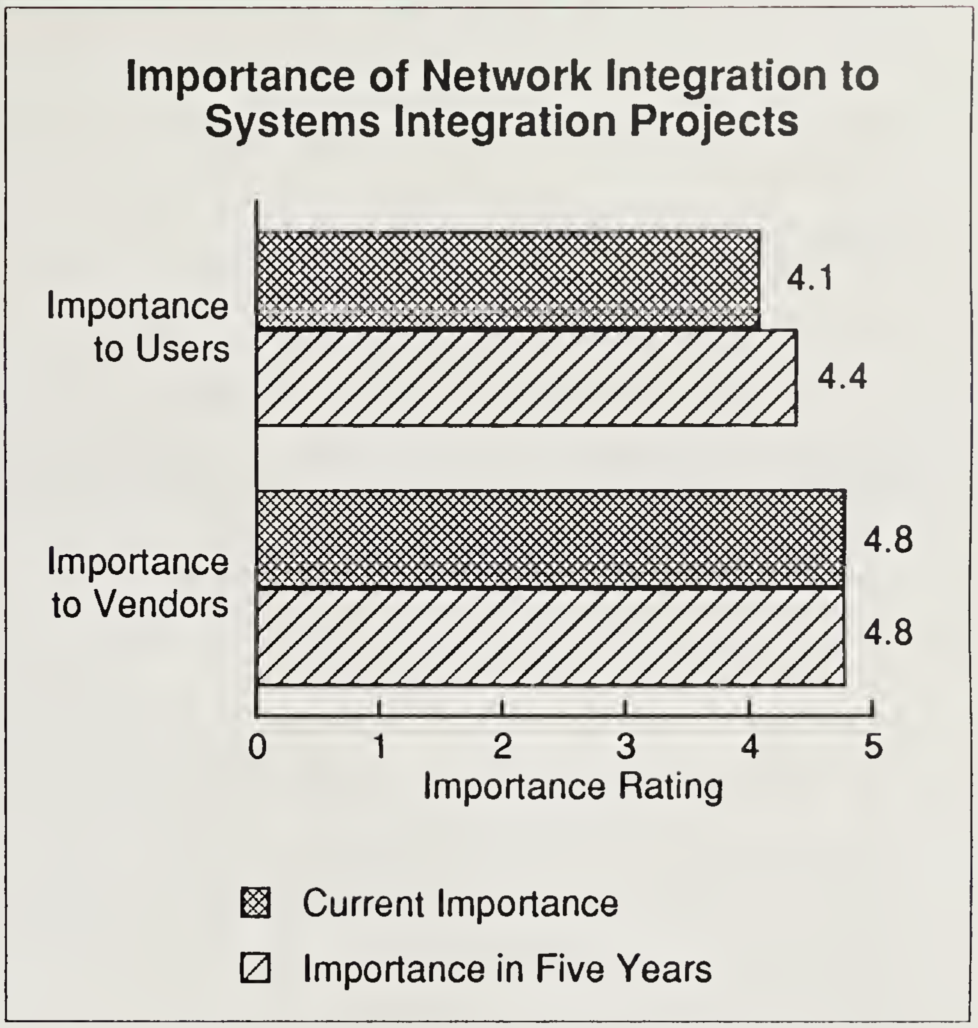
SIIR4 6/90 tbc

CONDITIONS AGREEMENT

INPUT

- What do users expect from network integrators?
- What do network managers expect?
- What kind of skills, and what level of competence, do users say they require from network integrators?
- Who are the leading vendors in this market?
- How have they successfully sold their services?

And more, including a full set of conclusions and recommendations, in which INPUT analyzes its own research findings and translates them into practical considerations for network and systems integration vendors.



The fact that users rate the importance of network integration in systems integration projects lower than vendors indicates a sales pitfall, and the need for client education on this subject. This is just one example of the kind of question INPUT answers in *Network Integration, 1990-1995.*

Leveraging INPUT's Expertise

The days of the single-vendor, homogeneous computing environment are long gone. Computing power has been dispersed throughout organizations—first to the department level, then to the desktop level—with end users having a tremendous amount of influence over what kind of computer they will use. Mission-critical information now exists all over the typical company, on every conceivable kind of platform, accessible through every conceivable kind of communications architecture.

The opportunity for network integration is clear. But to make the most of that opportunity requires more than just aggressive development and marketing programs. It requires detailed, timely, and firsthand research so that you can know exactly where to deploy your scarce resources for maximum sales impact.

To do such a study yourself would require tens of thousands of dollars and hundreds of man-hours in staff time.

But to obtain the complete results of such a study requires only that you get in touch with INPUT. Enclosed is a coupon that outlines your options for getting this information as soon as possible.

So take a moment now, fill out the coupon, and drop it in the mail today. We spent weeks talking to your prospects, and months analyzing their responses. And isn't that the kind of information you need to compete in today's network integration market?

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

SIIR4 6/90

SOP

INPUT®

Information Services Industry

Systems Operations Program

Systems Operations Program

SYSTEMS OPERATIONS PROGRAM

Systems Operations (SO) is potentially the most revolutionary market of the 1990s. It is an outgrowth of facilities management—in which today's customers are buying much more than operation of their equipment. They are also buying complete operations of their computer and communications systems and in addition they participate in management and direction setting. Recent entry of large computer manufacturers and professional service companies has stirred new interest in this market and established SO as a strategic offering.

Management of large user corporations and institutions are recognizing that operations of information processing systems detracts time and energy from the development of mission critical systems—systems that can provide their organizations with a competitive advantage. They are turning over the tactical planning, management control and operations of their systems to SO vendors under long-term contracts.

Systems integration and systems operations are closely related. Systems integrators manage the development of new systems and systems operators manage and operate both new and existing ones. The authority assumed by these firms has changed the channels for distributing information products, and services. Vendors building or operating clients computers and communications systems control or influence acquisition of initial or additional products and services.

INPUT's Systems Operations Program provides answers to the questions in this rapidly growing and changing market. Over 15 years of experience tracking the issues, recommending strategies and forecasting growth for facilities management and other information services markets makes us well qualified to provide this service.

The Systems Operations Program described herein is a sister product to our Systems Integration Program. The two share a common market analysis report that examines the relationships between these two important markets. You should consider both programs; they can be packaged together, as they provide answers to the issues regarding the two key components of the "outsourcing" movement.

MARKET ANALYSIS REPORTS

Systems Integration and Systems Operations Market Analysis

This report examines systems integration (SI) and operations (SO) trends and issues in the U. S. domestic market. SI user expenditures are forecast for the next five years by vertical industry market, by type of SI (application, network and data), and by component (information processing equipment, software packages, professional services and associated services). SO user expenditures are also forecast by vertical industry market as well as by service mode (processing services and professional services). Particular attention is paid to commercial market opportunities, with the federal market treated as one of fifteen vertical markets. The federal market is covered in greater detail in a separate report.

Systems Operations Vendor Profiles and Analysis

This report analyzes vendors within a competitive structure (hardware vendors, professional services firms, communications companies, aerospace firms and systems operations companies), and identifies similarities and differences in a variety of areas. These include: organization, financial characteristics, strategies and markets, capabilities and products. In-depth profiles of key vendors, including the industry leaders, are provided.

Network Management

There is considerable debate over user's willingness to employ an outside vendor to manage their telecommunications network. This report examines both user and vendor views of the issues and trends driving and/or hindering the growth of this market. A five-year market forecast is provided, leading vendors are identified, and an assessment of the importance of vendor capabilities in the buyer selection process is included.

Systems Operations Management Trends

This report identifies and examines the major trends and issues driving the systems operations market and the management practices used when participating in this market. Based on a survey of SO firms, it will identify the major management issues in the areas of personnel, client relations, security, investment, and performance measurement. It also discusses the methods employed by successful vendors to manage these areas.

CONFERENCES AND SEMINARS

Systems Operations Program Seminar
This seminar is an interactive working session which reviews and discusses the results of current research. Industry developments, client acceptance of SO, and marketing concepts are also discussed.

Joint Client Conference
This annual conference updates INPUT's clients on key strategic industry trends and developments, and provides a forum for interaction with senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- The Systems Integration Program analyzes the opportunity for vendor-provided solutions to complex information, communications or automation requirements through the implementation of information products and services. INPUT provides SI research programs for both the U.S. and European markets.
- The Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Europe.
- The Vendor Analysis Program provides company profiles and support data on information services vendors in North America and Europe.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS
• Systems Integration and Systems Operations Market Analysis • Vendor Profiles and Analysis • Network Management • Systems Operations Management Trends
SYSTEMS OPERATIONS PROGRAM SEMINAR
JOINT CLIENT CONFERENCE
CLIENT SUPPORT
• Access to INPUT Consultants • "Hotline" Inquiry Service • On-Site Visit

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours), as well as clarification/amplification of report and presentation data.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

Information Services Industry

Systems Operations Program

Systems Operations Program

SYSTEMS OPERATIONS PROGRAM

Systems Operations (SO) is potentially the most revolutionary market of the 1990s. It is an outgrowth of facilities management—in which today's customers are buying much more than operation of their equipment. They are also buying complete operations of their computer and communications systems and in addition they participate in management and direction setting. Recent entry of large computer manufacturers and professional service companies has stirred new interest in this market and established SO as a strategic offering.

Management of large user corporations and institutions are recognizing that operations of information processing systems detracts time and energy from the development of mission critical systems—systems that can provide their organizations with a competitive advantage. They are turning over the tactical planning, management control and operations of their systems to SO vendors under long-term contracts.

Systems integration and systems operations are closely related. Systems integrators manage the development of new systems and systems operators manage and operate both new and existing ones. The authority assumed by these firms has changed the channels for distributing information products, and services. Vendors building or operating clients computers and communications systems control or influence acquisition of initial or additional products and services.

INPUT's Systems Operations Program provides answers to the questions in this rapidly growing and changing market. Over 15 years of experience tracking the issues, recommending strategies and forecasting growth for facilities management and other information services markets makes us well qualified to provide this service.

The Systems Operations Program described herein is a sister product to our Systems Integration Program. The two share a common market analysis report that examines the relationships between these two important markets. You should consider both programs; they can be packaged together, as they provide answers to the issues regarding the two key components of the "outsourcing" movement.

MARKET ANALYSIS REPORTS

Systems Integration and Systems Operations Market Analysis
This report examines systems integration (SI) and operations (SO) trends and issues in the U. S. domestic market. SI user expenditures are forecast for the next five years by vertical industry market, by type of SI (application, network and data), and by component (information processing equipment, software packages, professional services and associated services). SO user expenditures are also forecast by vertical industry market as well as by service mode (processing services and professional services). Particular attention is paid to commercial market opportunities, with the federal market treated as one of fifteen vertical markets. The federal market is covered in greater detail in a separate report.

Systems Operations Vendor Profiles and Analy
This report analyzes vendors within a competitive structure (hardware vendors, professional services firms, communications companies, aerospace firms and systems operations companies), and identifies similarities and differences in a variety of areas. These include: organization, financial characteristics, strategies and markets, capabilities and products. In-depth profiles of key vendors, including the industry leaders, are provided.

Network Management
There is considerable debate over user's willingness to employ an outside vendor to manage their telecommunications network. This report examines both user and vendor views of the issues and trends driving and/or hindering the growth of this market. A five-year market forecast is provided, leading vendors are identified, and an assessment of the importance of vendor capabilities in the buyer selection process is included.

Systems Operations Management Trends
This report identifies and examines the major trends and issues driving the systems operations market and the management practices used when participating in this market. Based on a survey o SO firms, it will identify the major management issues in the areas of personnel, client relations, security, investment, and performance measurement. It also discusses the methods employed by successful vendors to manage these areas.

INPUT®

CONFERENCES AND SEMINARS

Systems Operations Program Seminar
This seminar is an interactive working session which reviews and discusses the results of current research. Industry developments, client acceptance of SO, and marketing concepts are also discussed.

INPUT Client Conference
This conference updates INPUT's clients on key strategic industry trends and developments, and provides a forum for interaction with senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- The Systems Integration Program analyzes the opportunity for vendor-provided solutions to complex information, communications or automation requirements through the implementation of information products and services. INPUT provides SI research programs for both the U.S. and European markets.
- The Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Europe.
- The Vendor Analysis Program provides company profiles and support data on information services vendors in North America and Europe.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS

- Systems Integration and Systems Operations Market Analysis
- Vendor Profiles and Analysis
- Network Management
- Systems Operations Management Trends

SYSTEMS OPERATIONS PROGRAM SEMINAR

CLIENT CONFERENCE

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Visit

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours), as well as clarification/amplification of report and presentation data.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

Information Services Industry

Systems Operations Program

Systems Operations Program

SYSTEMS OPERATIONS PROGRAM

Systems Operations (SO) is potentially the most revolutionary market of the 1990s. It is an outgrowth of facilities management—in which today's customers are buying much more than operation of their equipment. They are also buying complete operations of their computer and communications systems and in addition they participate in management and direction setting. Recent entry of large computer manufacturers and professional service companies has stirred new interest in this market and established SO as a strategic offering.

Management of large user corporations and institutions are recognizing that operations of information processing systems detracts time and energy from the development of mission critical systems—systems that can provide their organizations with a competitive advantage. They are turning over the tactical planning, management control and operations of their systems to SO vendors under long-term contracts.

Systems integration and systems operations are closely related. Systems integrators manage the development of new systems and systems operators manage and operate both new and existing ones. The authority assumed by these firms has changed the channels for distributing information products, and services. Vendors building or operating clients computers and communications systems control or influence acquisition of initial or additional products and services.

INPUT's Systems Operations Program provides answers to the questions in this rapidly growing and changing market. Over 15 years of experience tracking the issues, recommending strategies and forecasting growth for facilities management and other information services markets makes us well qualified to provide this service.

The Systems Operations Program described herein is a sister product to our Systems Integration Program. The two share a common market analysis report that examines the relationships between these two important markets. You should consider both programs; they can be packaged together, as they provide answers to the issues regarding the two key components of the "outsourcing" movement.

MARKET ANALYSIS REPORTS

Systems Integration and Systems Operations Market Analysis
This report examines systems integration (SI) and operations (SO) trends and issues in the U. S. domestic market. SI user expenditures are forecast for the next five years by vertical industry market, by type of SI (application, network and data), and by component (information processing equipment, software packages, professional services and associated services). SO user expenditures are also forecast by vertical industry market as well as by service mode (processing services and professional services). Particular attention is paid to commercial market opportunities, with the federal market treated as one of fifteen vertical markets. The federal market is covered in greater detail in a separate report.

Systems Operations Vendor Profiles and Analysis
This report analyzes vendors within a competitive structure (hardware vendors, professional services firms, communications companies, aerospace firms and systems operations companies), and identifies similarities and differences in a variety of areas. These include: organization, financial characteristics, strategies and markets, capabilities and products. In-depth profiles of key vendors, including the industry leaders, are provided.

Network Management
There is considerable debate over user's willingness to employ an outside vendor to manage their telecommunications network. This report examines both user and vendor views of the issues and trends driving and/or hindering the growth of this market. A five-year market forecast is provided, leading vendors are identified, and an assessment of the importance of vendor capabilities in the buyer selection process is included.

Systems Operations Management Trends
This report identifies and examines the major trends and issues driving the systems operations market and the management practices used when participating in this market. Based on a survey of SO firms, it will identify the major management issues in the areas of personnel, client relations, security, investment, and performance measurement. It also discusses the methods employed by successful vendors to manage these areas.

CONFERENCES AND SEMINARS

Systems Operations Program Seminar
This seminar is an interactive working session which reviews and discusses the results of current research. Industry developments, client acceptance of SO, and marketing concepts are also discussed.

Joint Client Conference
This annual conference updates INPUT's clients on key strategic industry trends and developments, and provides a forum for interaction with senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

RELATED SERVICES

- The Systems Integration Program analyzes the opportunity for vendor-provided solutions to complex information, communications or automation requirements through the implementation of information products and services. INPUT provides SI research programs for both the U.S. and European markets.
- The Market Analysis Program analyzes the computer/communications software and services markets in the U.S. and Europe.
- The Vendor Analysis Program provides company profiles and support data on information services vendors in North America and Europe.
- Custom Research and Consulting projects analyze market opportunities, user needs, competitive environment, acquisition targets, etc.
- Consultant Presentations—INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS
• Systems Integration and Systems Operations Market Analysis • Vendor Profiles and Analysis • Network Management • Systems Operations Management Trends
SYSTEMS OPERATIONS PROGRAM SEMINAR
JOINT CLIENT CONFERENCE
CLIENT SUPPORT
• Access to INPUT Consultants • "Hotline" Inquiry Service • On-Site Visit

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline" inquiry service provides fulfillment of 'short-term' research needs (requiring less than two hours), as well as clarification/amplification of report and presentation data.

On-Site Visit
An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407   Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630   Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870   Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113   Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531   Fax (03) 864-4114

Systems Operations Program—U.S. (SOP) 1990 Program

Annual Report	Reports*	Client Support
U.S. Systems Integration/Operations Forecast and Trends, 1990-1995	SO Vendor Analysis Profiles and Updates SO Network Management SO Management Practices	SI Client Seminar "Hotline" Inquiry Service Access to INPUT Information Centers On-Site Presentation (travel additional) . . . . INPUT Annual Executive Conference (optional; reduced fee)

* Preliminary Topics

INPUT's 1990 Systems Operations Program—U.S.

Yes!
Please enter my order as described:

- ❑ Subscription to INPUT's Systems Operations Program (SOP) at the fee of $14,500.
- ❑ Add on to Systems Integration Program (SIP) at the fee of $10,500.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning ______ _______. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and it's attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

- ❑ Enclosed is my check in the amount of $________________.
- ❑ Bill my company on purchase order number ______________ in the amount of $_________________.

Travel expenses for on-site presentations are additional and will be billed separately.
California clients: Please add applicable sales tax on 25% of purchase price.
Connecticut clients: Please add 8% sales tax on total amount.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

____
Organization

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

1288S-SOP 12/89

INPUT®

EUROPEAN SOFTWARE AND SERVICES MARKET STUDIES

The marketing challenges of the 1990s

Software and Support Pricing—Western Europe, 1989-1994
(Dec. 1989) SMSE

Price: £1250.00

The structuring and effective pricing of software product support and maintenance is one of the critical tasks for vendor management as software increasingly becomes the dominant delivery mechanism. This report examines this complex area by looking at the overall environment for software product support and maintenance services, and specifically at the increasingly important midrange sector of minicomputers and workstations. The report is invaluable in helping vendors develop effective pricing policies and successful support and maintenance strategies.

Workstation Applications Software, 1989-1994
(May 1990) SWSE

Price: £1250.00

The market for workstation applications is the fastest growing sector of the software products market. INPUT's report explains the reason for this growth and how vendors can benefit. It provides an assessment of the market potential, explains user needs and perceptions, and discusses the impact of standards issues, such as UNIX. The report also contains profiles of major vendors.

European Software Applications Solutions Opportunities, 1990-1995 (Sept. 1990) MEAOE

Price: £1500.00

The challenge for vendors of software application solutions in the 1990s is to provide integrated products and pan-European support. This report forecasts the size of the market and identifies the fastest growing markets. It discusses the opportunities for vertical market products, cross-industry market products, application software products and turnkey systems. It discusses market issues such as industry standards, quality and integration.

Systems Software Products—Western Europe, 1990-1995
(Dec. 1990) MEYOE

Price: £1500.00

This report examines the market for systems software products, segmented into systems control products, application development tools and data centre management products. The report discusses trends such as the move towards distributed processing, and assesses the likely effect on the systems software market. The impact of open systems is also discussed.

Trends in Processing Services—Western Europe, 1990-1995
(Nov. 1990) MEPOE

Price: £1500.00

There will be a major restructuring of the transaction processing market over the next decade. This report will help vendors to understand what changes are taking place and how they are affecting businesses. Research shows that there are significant opportunities available for vendors, despite a decline in growth rate. The report provides market forecasts and vendor rankings, with percentage market shares for each vendor.

The Challenge of the Single European Market—1992 and Beyond (Dec. 1989) XNTE

Price: £1950.00

Although the changes brought about by the Single European Act are not going to happen overnight, they are going to have a significant impact on the computer software and services industry. This report assesses the likely development of the software and services market and analyses the potential threat to European companies from the pan-European giants—many of which are American companies. The report identifies the market sectors that vendors believe will be most affected by the changes and recommends vendor strategies for the 1990s.

European Software and Services Market, 1990-1995—Insurance Sector (June 1990) MEIIO

Price: £1250.00

European insurance companies are being forced to fundamentally rethink their whole approach to information systems as they face up to the need to create fully electronic systems to compete effectively in the 1990s. This is leading to an increased demand for software and services, which creates opportunities for vendors offering networking services, specialised software packages and professional services. In the Insurance Sector report, INPUT breaks down the market into life, non-life and reinsurance and discusses the opportunities available in each sector. Regulatory issues affecting the market are discussed, and there is a review of merger and acquisition activity—which is one of the driving forces in the market for software and services in this sector.

European Software and Services Market, 1990-1995—Banking and Finance Sector (July 1990) MEIBO

Price: £1500.00

Financial markets will be deregulated by 1993; this is forcing banking and finance institutions to restructure, and at the same time develop new competitive products and services. INPUT's Banking and Finance Sector report explains how banking and finance markets are restructuring and how this will affect software and services vendors. The report contains detailed market forecasts and profiles leading vendors, and recommends vendor strategies for the 1990s in this fast-growing sector.

European Software and Services Market, 1990-1995—Discrete Manufacturing Sector (Nov. 1990) MEIDO

Price: £1500.00

Although the determinants of success in discrete manufacturing vary from sector to sector, the need to reduce costs and to improve product quality remain. In addition, heavy emphasis is now being placed on lead times—for both product introduction and order fulfillment—and on increased flexibility of output. INPUT's Discrete Manufacturing Sector report evaluates the impact of these trends on the software and services market. The report contains detailed market forecasts and identifies the key opportunities available.

European Software and Services Market, 1990-1995—Process Manufacturing Sector (Dec. 1990) MEIPO

Price: £1500.00

This companion volume examines the issues and trends in the process manufacturing sector and assesses their impact on the software and services market. The report contains detailed five-year market forecasts and identifies the key opportunities available.

European Software and Services Market, 1990-1995—Retail and Wholesale Distribution Sector (Nov. 1990) MEIRO

Price: £1250.00

This report analyses the market for software and services in the distribution industries of Western Europe. It identifies the major trends, issues and opportunities for vendors, and provides market forecasts for wholesale and retail activities in France, Germany, Italy, Spain, the U.K. and the rest of Europe.

Customer Service Market Reports

Fourth-Party Maintenance Opportunities in Western Europe, 1989-1994
(July 1989) CFPE

Price: £950.00

This report defines and identifies the fourth-party maintenance market in Western Europe and forecasts market size and growth opportunities in five major European economies: the U.K., Benelux, France, Italy and Germany. The report discusses factors that are influencing the market and summarises opinions from fourth-party maintenance vendors about market dynamics.

Quality Issues in Western European Customer Services
(June 1989) CQUE

Price: £1000.00

This report identifies the major issues related to service quality of Western European customer services. It analyses the relationship between a vendor's service quality image and its service performance. The report also discusses progress in implementing formal service quality standards (ISO 9000).

Customer Service Annual Reports—1990
(Dec. 1990) CEUSO-UMO-UPO

Price for each report: £1500.00

A separate annual report is available for each of three sectors—large systems, medium systems and PCs and workstations. The reports provide valuable insights into client satisfaction levels with a range of service elements. The reports assess trends by country and by vendor, and analyse the strengths and weaknesses of customer service. The data for these reports comes from over 1,600 user interviews in Europe.

Pricing Issues and Trends in Western European Customer Service (Dec. 1990) CEPRO

Price: £1500.00

A critical task for the service vendor is to balance service quality with the price users are prepared to pay for it. This report examines the issues and trends in European customer service pricing and can assist vendors in planning effective pricing strategies for the 1990s.

The Challenge of Network Service in Customer Service
(May 1990) CESIN

Price: £1500.00

Data communications networks continue to become increasingly critical to user support organisations, but the service and support necessary to maintain uptime and accessibility remains fragmented. This report provides service vendors with the information they need to plan strategies for implementing a successful service offering. The report gives market size and forecast, reveals user needs and discusses vendor issues and available opportunities.

Independent Maintenance—Western Europe, 1990-1995
(July 1990) CEIMO

Price: £1500.00

The next decade is crucial for independent maintenance vendors. They are still gaining market share, but as newer and more reliable equipment leads to a decline in service revenues from computer maintenance, independent vendors will have to be able to offer services such as software support, environmental services, and network servicing in order to maintain growth rates. This report recommends a strategy for IBM vendors, gives market sizes, and profiles over 60 leading European independent maintenance vendors.

Systems Support Opportunities for Customer Services—Western Europe, 1990-1995
(Sept. 1990) CEPRS

Price: £1500.00

Systems operations (facilities management) and disaster recovery markets can provide the key to combatting declining equipment maintenance revenue growth. This report examines these markets (giving market size and penetration by major European country), proposes a strategy for entering these markets, and identifies companies already active in systems operations and disaster recovery.

Western European Customer Services Market Analysis and Forecast, 1990-1995
(Dec. 1990) CESMO

Price: £1500.00

This report analyses and forecasts user expenditure for customer services in Western Europe. Revenue figures are split by vendor type (equipment vendors, TPM vendors, dealers and distributors), by service sector (hardware service, software support, professional services, dealers and distributors), by size and by country. Leading vendors are ranked by revenues, enabling customer service organisations to assess their own positions in the market.

Service Update International
(12 monthly issues) CEQSR

Annual subscription: £1100.00

This is a monthly newsletter which tracks developments in the European and American customer services market. The newsletter keeps customer service companies up-to-date with mergers, acquisitions, contracts and new service offerings.

Network Services Market Reports

Managed Network and Messaging Services, 1990-1995 (Nov. 1990) NEMSO Price: £1500.00	This report covers the market for services such as protocol conversion services, X.25 packet assemblers and disassemblers, and local-area network services. The report covers all the major European countries and reviews third-party vendors selling messaging services. The report discusses key issues such as the rapid development of strategic alliances between telecommunications and software and services companies. It also considers the planned deregulation of the EEC telecommunications markets.
Western European EDI Developments, 1990-1995 (Dec. 1990) NEEDO Price: £1500.00	This report examines the opportunities available to vendors of electronic data interchange services. It covers all major European countries, profiles leading vendors, and identifies the challenges that vendors are likely to face over the next five years—such as the need to be able to offer an EDI service which handles all classes of networks on an end-to-end basis.
Western European Network Services Markets, 1990-1995 (Feb. 1991) NENSO Price: £1500.00	This report provides an analysis and forecast for the network services sector of the software and services market. The network services market is segmented into network applications (managed network services, messaging services, EDI and other application services) and electronic information services (on-line databases and news services). The report provides forecasts for industry-specific and cross-industry expenditures, as well as profiles and market share analysis of leading vendors.
Financial Network Services—Western Europe, 1990-1995 (Oct. 1990) NEFNO Price: £1500.00	The movement towards the deregulation of basic telecommunications carriage will open up a highly competitive market, as banks, service providers and network operators look to increase their market share. This report examines the effect of the proposed deregulation and assesses the opportunities available for vendors. Profiles of leading vendors illustrate the different marketing and service strategies.

Systems Integration Market Reports

Systems Integration Market Forecast—Western Europe, 1990-1995 (Dec. 1990) SEIMO

Price: £1500.00

This report examines demand and market forces in Europe for systems integration. For each country market, the report estimates the market size, forecasts market growth and identifies the leading vendors. Systems integration is defined as vendor management of a project that provides a complete solution to a complex information system, networking, or automation requirement.

Systems Integration Vendor Issues—Western Europe, 1990-1995 (Nov. 1990) SEIVO

Price: £1500.00

This report examines the European systems integration market from a vendor point of view, identifying and commenting on the major challenges that face systems integration vendors. This report makes recommendations to vendors already active in the market and to those currently outside the market.

Systems Integration User Perspectives—Western Europe, 1990-1995 (Feb. 1991) SEIUO

Price: £1500.00

This report examines the trends that are affecting the systems integration market from a user's point of view. It investigates the major issues in industry markets that are leading users to offer systems integration contracts, and examines user attitudes and concerns about selecting a vendor.

Systems Operations Market Reports

Systems Operations Market Forecast—Western Europe, 1990-1995 (Oct. 1990) SESMO

Price: £1500.00

Systems operations (facilities management) is one of the smallest but fastest growing sectors of the European software and services market. This report examines the demand and market forces in each European country market. Leading vendors are identified and market size and growth rates are forecast. The report also identifies the impact of systems operations on other markets in the software and services industry.

Systems Operations Vendor Issues—Western Europe, 1990-1995 (Oct. 1990) SEEVO

Price: £1500.00

This report examines the market trends affecting the systems operations (facilities management) market from a vendor point of view. It examines the effect of trends on vendors and discusses the impact for vendors who have not entered the market. It also discusses the main issues of bidding for and managing systems operations contracts and identifies necessary vendor skills.

Systems Operations User Perspectives—Western Europe, 1990-1995 (Jan. 1991) SESUO

Price: £1500.00

This report identifies user attitudes and assesses their significance for systems operations vendors. The report examines, from a user's point for view, the main issues in contracting out the

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229
Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531
Fax (03) 864-4114

INPUT

EUROPEAN SOFTWARE AND SERVICES MARKET STUDIES

ORDER FORM

To: INPUT, 1280 Villa Street, Mountain View, CA 94041, Tel. (415) 961-3300, Fax (415) 961-3966
or: INPUT, 1953 Gallows Road, Suite 560, Vienna, VA 22182, Tel. (703) 847-6870, Fax (703) 847-6872

Software and Services Market Reports

- ☐ The Western European Market for Computer Software and Services, 1989-1994 (Mar. 1990) SARE Price: $2775.00
- ☐ The Western European Market for Computer Software and Services, 1990-1995 (Dec. 1990) MEFOE Price: $2775.00
- ☐ Turnkey Systems Opportunities—Western Europe, 1989-1994 (Nov. 1989) STWE Price: $2325.00
- ☐ Professional Services Challenges, 1989-1990 (Feb. 1990) SPRE Price: $2325.00
- ☐ Professional Services Opportunities, 1990-1995 (Nov. 1990) MEROE Price: $2775.00
- ☐ Western European Electronic Information Services, 1989-1994 (Dec. 1989) SNSE Price: $2325.00
- ☐ Software and Support Pricing—Western Europe, 1989-1994 (Dec. 1989) SMSE Price: $2325.00
- ☐ Workstation Applications Software, 1989-1994 (May 1990) SWSE Price: $2325.00
- ☐ European Software Applications Solutions Opportunities, 1990-1995 (Sept. 1990) MEAOE Price: $2775.00
- ☐ Systems Software Products—Western Europe, 1990-1995 (Dec. 1990) MEYOE Price: $2775.00
- ☐ Trends in Processing Services—Western Europe, 1990-1995 (Nov. 1990) MEPOE Price: $2775.00
- ☐ The Challenge of the Single European Market—1992 and Beyond (Dec. 1989) XNTE Price: $3650.00
- ☐ European Software and Services Market, 1990-1995—Insurance Sector (June 1990) MEIIO Price: $2325.00
- ☐ European Software and Services Market, 1990-1995—Banking and Finance Sector (July 1990) MEIBO Price: $2775.00
- ☐ European Software and Services Market, 1990-1995—Discrete Manufacturing Sector (Nov. 1990) MEIDO Price: $2775.00
- ☐ European Software and Services Market, 1990-1995—Process Manufacturing Sector (Dec. 1990) MEIPO Price: $2775.00
- ☐ European Software and Services Market, 1990-1995—Retail and Wholesale Distribution Sector (Nov. 1990) MEIRO Price: $2325.00

Customer Service Market Reports

- ☐ Fourth-Party Maintenance Opportunities in Western Europe, 1989-1994 (July 1989) CFPE Price: $1765.00
- ☐ Quality Issues in Western European Customer Services (June 1989) CQUE Price: $1850.00
- ☐ Customer Service Annual Reports—1990 (Dec. 1990) ☐ CEUSO - Large ☐ CEUMO - Medium ☐ CEUPO - Small Price for each report: $2775.00
- ☐ Pricing Issues and Trends in Western European Customer Service (Dec. 1990) CEPRO Price: $2775.00
- ☐ The Challenge of Network Service in Customer Service (May 1990) CESIN Price: $2775.00
- ☐ Independent Maintenance—Western Europe, 1990-1995 (July 1990) CEIMO Price: $2775.00
- ☐ Systems Support Opportunities for Customer Services—Western Europe, 1990-1995 (Sept. 1990) CEPRS Price: $2775.00
- ☐ Western European Customer Services Market Analysis and Forecast, 1990-1995 (Dec. 1990) CESMO Price: $2775.00
- ☐ Service Update International (12 monthly issues) CEQSR Annual subscription: $2050.00

Network Services Market Reports

☐ Managed Network and Messaging Services, 1990-1995 (Nov. 1990)
NEMSO Price: $2775.00

☐ Western European EDI Developments, 1990-1995 (Dec. 1990)
NEEDO Price: $2775.00

☐ Western European Network Services Markets, 1990-1995 (Feb. 1991)
NENSO Price: $2775.00

☐ Financial Network Services—Western Europe, 1990-1995 (Oct. 1990)
NEFNO Price: $2775.00

Systems Integration Market Reports

☐ Systems Integration Market Forecast—Western Europe, 1990-1995 (Dec. 1990)
SEIMO Price: $2775.00

☐ Systems Integration Vendor Issues—Western Europe, 1990-1995 (Nov. 1990)
SEIVO Price: $2775.00

☐ Systems Integration User Perspectives—Western Europe, 1990-1995 (Feb. 1991)
SEIUO Price: $2775.00

Systems Operations Market Reports

☐ Systems Operations Market Forecast—Western Europe, 1990-1995 (Oct. 1990)
SESMO Price: $2775.00

☐ Systems Operations Vendor Issues—Western Europe, 1990-1995 (Oct. 1990)
SEEVO Price: $2775.00

☐ Systems Operations User Perspectives—Western Europe, 1990-1995 (Jan. 1991)
SESUO Price: $2775.00

TOTAL $ ____________________

I would like further information on the following:

____

____

☐ Please check if you would like further details about INPUT's subscription services.

TERMS OF PAYMENT—Payment in full is due within 30 days of invoice date.

☐ Enclosed is my check in the amount of $ ____________________.

☐ Invoice my company on purchase order number ____________________ in the amount of $ ____________________.

CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense which may result from incompleteness or inaccuracy of the information provided.

Authorized By:

____
Client Organization

____
Address

____
City State Zip

____
Signature

____
Name

____
Title

____
Telephone Date

Accepted by INPUT:

____
Signature

____
Name

____
Title

____
Date

AMMKT 10/90

EUROPE

INPUT®

Software and Services Industry

Network Services Programme—Europe

Network Services Programme—Europe

- **Network Services Market**

  This central report analyses the Western European market for network services. This market sector includes managed network services and network applications. The report provides five-year market forecasts for the complete sector, broken down by market segment and reviews major issues and trends.

- **Messaging Services: The Opportunity**

  Rapidly growing communications networks and application use are driving the need for network management capability. This report examines the service opportunities emerging in this marketplace caused by the convergence between managed and messaging network services. X.25 and X.400 technologies are discussed with reference to their importance in attracting corporate and industry sector network users. Extensive market forecasts for Western Europe are given for the forecast period 1990-1995.

- **Trade Data Interchange: Market Opportunities**

  Electronic Data Interchange (EDI) is centre stage in the rapidly developing world of business-to-business communication and is the most talked about of the trade data interchange applications. This report analyses the Western European market for trade data interchange applications, examines key trends and issues and provides a five-year forecast of market size and growth.

- **Financial Network Services: Closing the Loop**

  One of the most important and rapidly growing areas for network application that for financial network services. This report assesses the opportunities available for network services and software providers in this area. Major user and vendor issues are reviewed in order to highlight marketing and development opportunities.

- **EIS Market Development**

  The market for electronic information services (EIS), primarily on-line database services, is one of the key areas in the rapid progress towards an "information" driver economy. This report identifies key opportunities and trends in this important market segment and presents a market forecast for 1990-1995.

INPUT®

PLAN FOR SUCCESS

INPUT's Network Services Programme is a continuing service that provides timely and accurate intelligence on a range of network service applications.

CLIENT SUPPORT

- **Access to INPUT Consultants**

  Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

- **"Hotline" Inquiry Service**

  This service provides fulfillment of short-term research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.

- **On-Site Visits**

  An INPUT consultant presents research results and industry forecasts at your site. Your issues and interests are discussed together with industry trends.

- **Client Meetings**

  Regular meetings, held in various European locations, enable clients to meet others in a small, informal group. INPUT consultants update clients on the latest market developments and there is ample time for discussion.

RELATED SERVICES

- Multinational network studies provide information for planning and operating multinational telecommunications networks.

- The Market Analysis Programme analyses the computer/communications software and services markets in the U.S. and Western Europe.

- The Vendor Analysis Programme provides company profiles and support data on European vendors.

- Custom Research and Consulting projects analyse market opportunities, user needs, competitive environment, acquisition targets, etc.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-4026 Fax (03) 864-4114

INPUT®

Workstation Software Applications Products Opportunities, Western Europe, 1989-1994

Workstation Software

- Assess the potential of the market
- Discover the effects of UNIX
- Find out user requirements
- Compare vendor attitudes
- Learn which application sectors are growing the fastest
- Use the extensive 5-year forecasts to plan ahead

Companies profiled:

Sun

Digital

Hewlett-Packard

IBM

Bull

"Workstation manufacturers are convinced that their machines are the way forward for the average corporate PC user and no longer the sole province of engineers and programmers."

Workstation Software Applications Products Opportunities, Western Europe, 1989-1994
Market Size and Forecasts
• Software products market environment • Overall software • Workstation software • Country market
Issues and Trends
• Workstation applications software, competitive environment • Industry-specific applications • Cross-industry applications • Systems software • Product development issues • Technical issues: RISC, UNIX • User organisational issues • Workstation software issues • User view of application requirements • Mergers, acquisitions and alliances • Workstations and the PC

The market for workstation software is growing at a faster rate than any other part of the software products market. This growth can be attributed to the trend towards distributed processing, away from the environment where many users share a mini or a mainframe.

The report examines each of the main groups active in the workstation market:

- European-owned independent vendors
- U.S.-owned independent vendors
- Equipment manufacturers

and discusses activities in

- Industry-specific markets
- Cross-industry markets

You will learn the opportunities available and the current competitive environment for:

- Project management software
- Bundled solutions
- User interface management systems
- Computer-aided engineering
- Electronic design automation
- Application development tools
- Object-orientated techniques
- Mapping software
- Expert systems

Order Form

INPUT's Research Studies

Yes!
Please enter my order as described:

Workstation Software Applications Products Opportunities, Western Europe, 1989-1994 report at the fee of $2,995.

TERMS OF PAYMENT
Payment in full is due within 30 days of invoice date.

- ☐ Enclosed is my check in the amount of $________________.
- ☐ Bill my company on purchase order number ______________ in the amount of $__________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax to the total amount.

CONDITIONS AGREEMENT
The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense which may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

Accepted By INPUT:

Signature

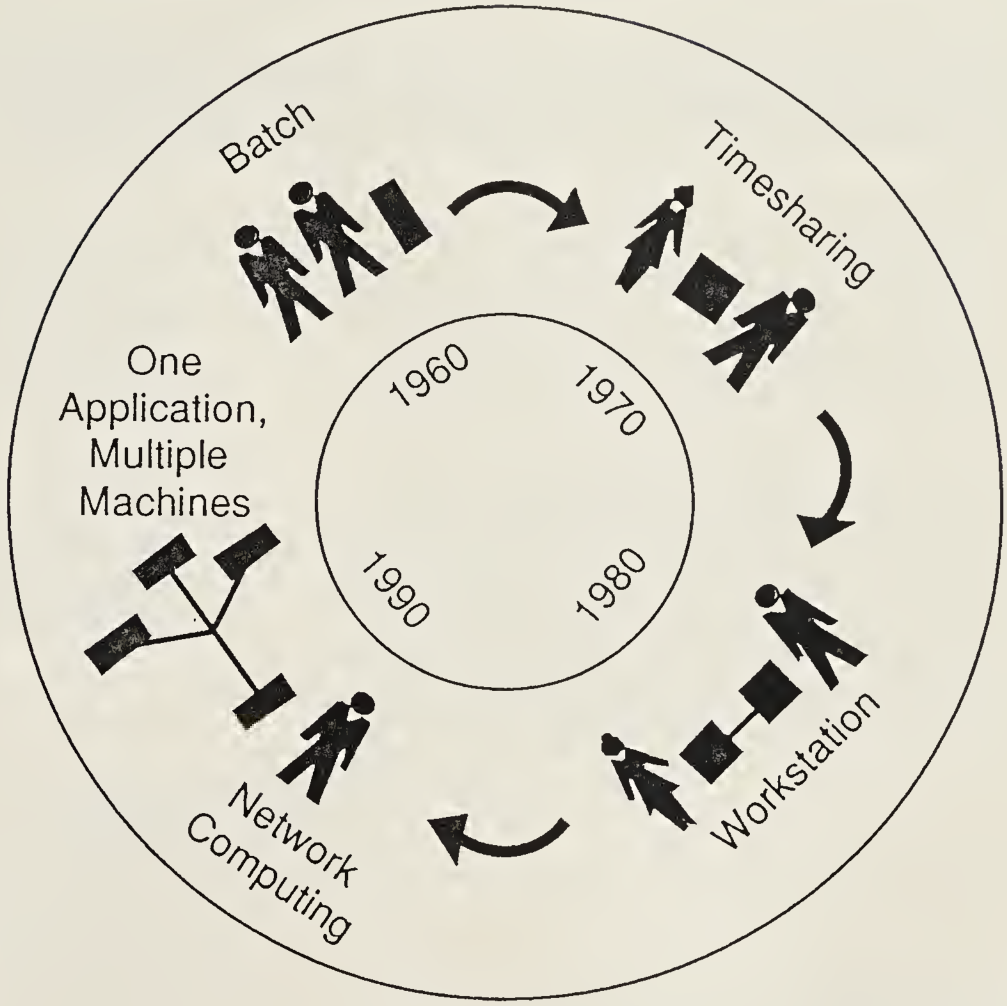
Name

Title

Date

SWSE-US 2/90

The Evolutionary Loop of Computing



Vendors who best understand the way in which the workstation market is changing and can respond to users' demand for more commercial applications software will gain a significant competitive advantage. Vendors need a clear, defined approach to standards in order to produce integrated software solutions which run under several hardware environments. Products need to be easy to use, perhaps providing graphical user interfaces. INPUT's report gives you the information you need to gain the competitive edge. It is essential reading for any company involved in, or thinking of entering, the workstation applications software market.

Call, fax, or mail your order to INPUT
to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(01) 493-9335
Telex 27113 Fax (01) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

«DATA /NEWLIST/CSPE.DOC»

INPUT

PICCADILLY HOUSE
33/37 REGENT STREET, LONDON SW1Y 4NF
TEL: (01) 493 9335 TELEX: 27113
FAX: (01) 629 0179

«NAME1»
«NAME2»
«NAME3»
«ADDR1»
«ADDR2»
«ADDR3»
«ADDR4»

Dear «GREET»

THE CHALLENGE OF NETWORK SERVICE IN CUSTOMER SERVICES

Data communications networks continue to become increasingly critical to user organisations, but the service and support necessary to maintain uptime and accessibility remains fragmented. Few vendors offer comprehensive approaches to network support, leaving users under-served and exposed in a vital area of their information system infrastructure. INPUT's new research study, **The Challenge of Network Service in Customer Services** recommends that vendors develop a full service offering in order to exploit the opportunities available in a market set to grow at over 20% per annum.

INPUT's report will provide you with the information you need to help you plan your strategies in this area. Supporting data communications networks is a complex task, as vendors have to contend with factros such as a multitude of standards, lack of network operational experience and the need for more understanding of network management needs.

INPUT believes that many vendors approach the market with a rather narrow product view that does not meet requirements for full network support. Users tend to take a wider view of what constitutes a network and include all connected terminals and the computer system, irresepective of whether this is a true network, a clustered system or a distributed data processing system.

INPUT's report reveals that a high proportion of networks are not supported by formal service contracts and that there is doubt among users as to where responsibility for network service shouldb e placed.

INPUT's report provides you with:

* Market size and forecast
* User needs
* Vendor issues
* Market opportunities
* Recommendations

INPUT LTD. DIRECTORS: P.A. CUNNINGHAM (U.S.A.), P.E. CUNNINGHAM, K.W.L. HOCKING, P. LINES
Registered Office: ROLLS HOUSE, 7 ROLLS BUILDING, FETTER LANE, LONDON EC4A 1NH
Registered in England No.: 1470416

It provides you with a clear picture of the current climate for servicing networks and is essential reading for any company involved in servicing networks.

To order the report, which will be available in June, please complete and return the enclosed form. I look forward to hearing from you.

Yours sincerely

Carol L. Nice
Senior Marketing Analyst
INPUT LTD

INPUT®

Network Support— A Customer Service Opportunity

INPUT's Report Will Help You to Work Out Your Strategies for Network Servicing

It will provide you with:

- market size for 1990 in Europe and the USA
- market forecast for 1995 and growth rates
- recommendations on how to develop network servicing

and will discuss:

- user and vendor issues
- the likely future development of networks
- the impact of future developments on service

The network servicing market is confused and badly defined

Accurate market information is therefore essential for success

The Challenge of Network Service in

Criticality of Data Networks Demands Full Service Solutions

Data communications networks are now becoming critical to user organisations, but the service and support necessary to maintain uptime and accessibility remains fragmented. Users are left exposed in a vital area of their information systems infrastructure, as only a few vendors offer comprehensive approaches to network support.

A Confused Market

There is a high degree of confusion in the network servicing market. One of the problems is that there are differences of opinion over what comprises a network; users tend to take a wider view of networks than vendors. It is essential, therefore, that vendors involved in this market should be aware of these differences in order to understand the needs of their clients. INPUT's report identifies these issues.

Market Inhibitors and Drivers

The report, *The Challenge of Network Service in Customer Services*, discusses the forces inhibiting the growth of the market. One of these is the reliability of the equipment which reduces the requirement for maintenance and hence the opportunities for vendors. Also, there is a relatively high percentage of users who opt for self-service (usually large and experienced users) and around one-third of users do not recognise the existence of a formal network service contract. Vendors need this type of market size and growth information in order to plan their strategies.

The report also identifies the driving forces for network servicing, such as:

- a growing user base
- many new applications

Report Contents

Market Opportunities

- Market forecast and growth
- Competitive environment
- Service opportunities
- New skill requirements

Key User Needs

- User networking
- Network service requirements:
  - access
  - small users
  - inexperienced users
  - service needs
- Future user requirements
- Systems operations
- Source of service
- User comments

The Vendor Challenge

- Network development
- Key vendor issues:
  - multivendor environment
  - wider range of skills
  - software compatibility
  - wider range of service
- Service development:
  - standards
  - intelligent buildings
- Opportunities:
  - network disaster recovery
  - network implementation
- Vendor recommendations

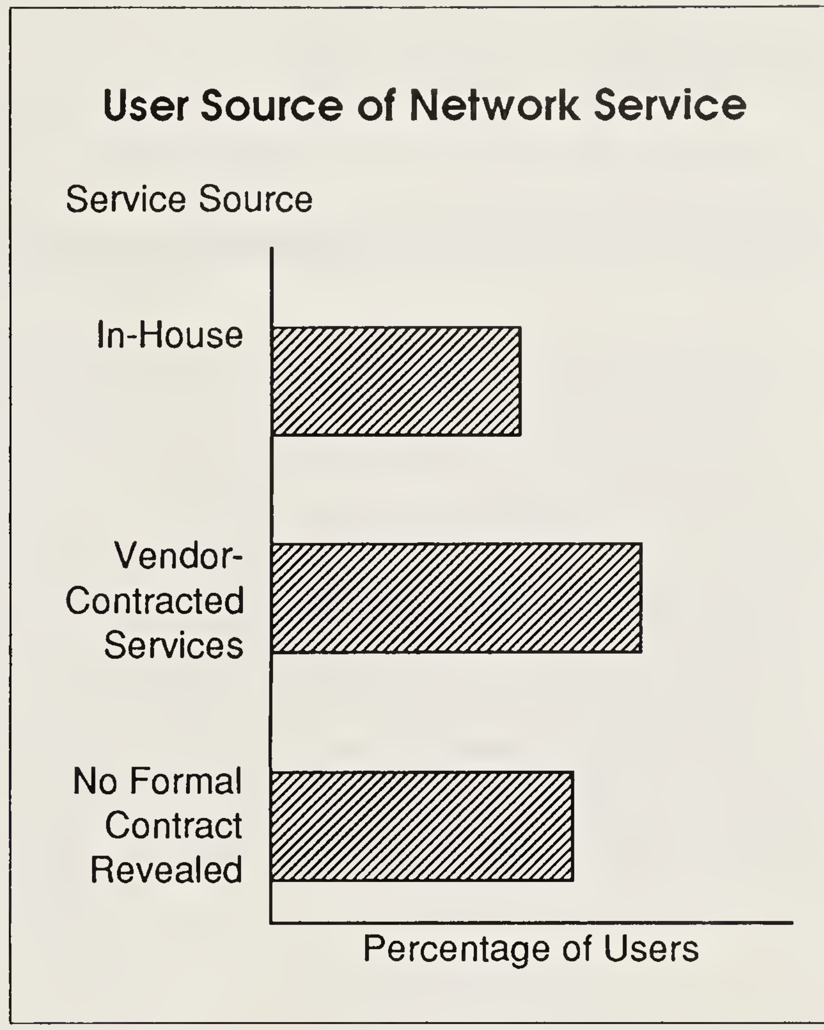
INPUT

Customer Services

Guidance for Vendors

INPUT has studied the market for network servicing and has assessed its potential growth and direction. As a result of this, INPUT has formulated some recommendations for vendors. These cover the new skill areas that INPUT believes vendors need to acquire to be able to take on multivendor network installations. The nature of these installations calls upon skills that are very often outside the traditional domain of customer service. INPUT has also carried out research into user attitudes. Vendors need to know users' views if they are to fully satisfy the needs of their clients. One important user requirement is for access to the network on demand, which implies a need for early detection of potential network problems.

This is an important strategic report for marketing and planning executives. It will help you to position your company for the 1990s.



Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT's Research Studies

Yes!
Please enter my order as described:

The Challenge of Network Service in Customer Services

❑ £1,250 if ordered by 31 May 1990

❑ £1,500 if ordered after 31 May 1990

Standard delivery includes two copies of all reports issued. Clients may purchase additional copies at £450 per copy.

❑ Please send ________ extra reports.
❑ Cheque enclosed in the amount of £________________.
❑ Please invoice my company on purchase order number ______________ in the amount of £________________.

The total fee is due and payable upon authorisation. UK prices exclude VAT.

CONFIDENTIALITY AGREEMENT

The client agrees to hold as confidential all information provided by INPUT through this service. The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organisation or person outside of parent, subsidiary or affiliated organisations without written consent of INPUT.

The client agrees to control access to the information provided to prevent unauthorised disclosure in violation of this agreement.

INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT LTD.
Piccadilly House
33-37 Regent Street
London SW1Y 4NF
England
Telephone:
071-493 9335
Fax 071-629 0179

Authorised By:

____
Organisation

____
Name

____
Title

____
Address

____

____
Telephone

____
Signature Date

Accepted By INPUT:

____
Signature

____
Name

____
Title

____
Date

CESIN 4/90

INPUT®

European Software and Services Market, 1990-1995

Banking and Finance Sector

This report will provide you with:

- Information on the opportunities available for software and services vendors in the banking and finance sector
- Discussion on market development
- Discussion on the changes instigated by the European Commission
- Vendor profiles
- Five-year market forecasts by delivery mode and by country

❖ Banking and finance institutions are restructuring in the 1990s

❖ Software and services vendors are in demand to help set up new systems

The Winds of Change

The European Commission plans to deregulate financial markets by 1 January, 1993. This is forcing banking and finance organisations to restructure and at the same time develop new products and services. In addition, the market is becoming more competitive, as banks and other financial institutions expand beyond their traditional market niches. As a result of merger and acquisition activity, new larger financial organisations are evolving, needing assistance from software and services vendors to integrate their existing information systems and develop new ones.

A New Opportunity

As the banking and finance sector comprises about 20% of the total European software and services market, this represents a significant opportunity for vendors. INPUT's report will help you to identify these opportunities. The report covers the banking and securities markets.

Deregulation means that any EEC financial institution will be free to extend its range of services beyond those defined by national legislation. Deregulation is also affecting non-EEC organisations. Banks are seeking to expand their range of products to the private customer, covering insurance, house financing, investments and even holiday travel. New technology will be required to support these operations; INPUT's report details some of the important factors users should take into account when considering investment in technology.

Order Form

INPUT's Research Studies

Yes!
Please enter my order as described:

European Software and Services Market, 1990-1995 Banking and Finance Sector report at the fee of $2,250.

TERMS OF PAYMENT

Payment in full is due within 30 days of invoice date.

❑ Enclosed is my check in the amount of $________________.

❑ Bill my company on purchase order number ______________ in the amount of $________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax to the total amount.

CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense which may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

Organization ____________

Name ____________

Title ____________

Address ____________

____

Telephone ____________

Signature ____________ Date

Accepted By INPUT:

Signature ____________

Name ____________

Title ____________

Date ____________

MEVRO-BF-US 5/90

INPUT

Big Player Market

The banking and finance sector is currently dominated by a small number of very large vendors. About 3% of these vendors control 70% of total end-user revenues. One of the reasons for this dominance is that banks make their information services decisions centrally, which creates an ideal market for large vendors to serve them. INPUT's report profiles some of these vendors, providing essential competitive information. The report also analyses the market share of different groups:

- Closed user groups
- Equipment vendors
- Independent vendors
- Electronic information service suppliers

High IS Spend Planned

Banks have traditionally been big spenders on information services—between 15% and 20% of their budgets are for IS. Information managers in banking are very concerned over establishing the right priorities and maintaining development schedules within budget—a challenge for vendors. INPUT believes that there will be strong demand for key professional services, and in some areas for software products, EDI and especially EFTPoS. The report details this demand.

Report Contents

Market Dynamics

- Single European Act
- Fewer, but bigger institutions
- Securities market
  - electronic stock exchange
  - local development strategies
  - pan-European plans
  - opportunity areas
- Banking market
  - mergers and acquisitions
  - Customer name database
  - UNIX
  - fault-tolerant processing
  - new customer terminal systems

Market Size

- Delivery modes
  - processing services
  - network services
  - software products
  - professional services
  - systems integration
  - turnkey systems
- Leading country markets

Competitive Environment

- Vendor trends
- Leading vendors
- Vendor profiles

Recommendations

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

MEVRO-BF 5/90

INPUT

Applications Solutions Opportunities Western Europe, 1990-1995

A NEW REPORT FROM INPUT

This report will help you assess the opportunities available for software application solutions in Europe. INPUT's report:

- Provides five-year market forecasts
- Identifies the fastest growing markets
- Describes market developments
- Discusses key opportunities for:
  - vertical market products
  - cross-industry market products
  - application software products
  - turnkey systems
- Discusses market issues
  - industry standards
  - quality
  - integration

Key Vendor Challenges

To provide:

➤ Integrated products

➤ Pan-European support

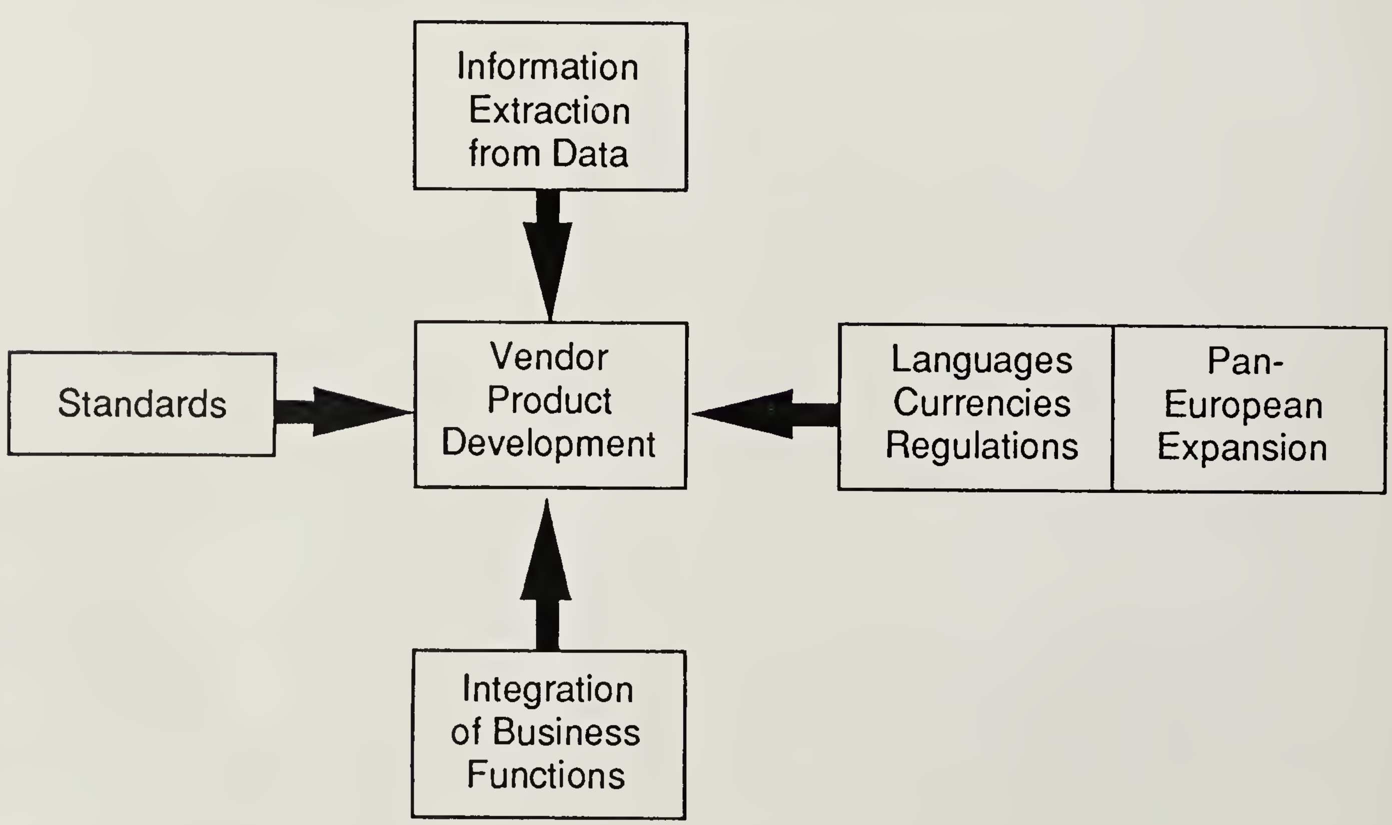
Applications Solutions Opportunities Western Europe, 1990-1995

Vendors of software applications solutions need to be aware of their buyers' selection criteria and need to know the commonest causes for complaint. This information can give your company a competitive edge, because you will know where to concentrate your efforts. INPUT's report, *Applications Solutions Opportunities—Western Europe, 1990-1995,* will provide this information. It discusses a number of user issues:

- Criteria in the purchase decision
- Support
- Documentation
- Functionality
- Errors
- Integration

The more that supplier companies understand users' issues, the more likely they will be able to satisfy users' requirements.

INTEGRATION: The Key to the 1990s



Order Form

INPUT's Research Studies

Yes!
Please enter my order as described:

Application Solutions Opportunities—Western Europe, 1990-1995 report at the fee of $2,250.

TERMS OF PAYMENT
Payment in full is due within 30 days of invoice date.

❑ Enclosed is my check in the amount of $________________.

❑ Bill my company on purchase order number ______________ in the amount of $__________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax to the total amount.

CONDITIONS AGREEMENT
The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense which may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

Accepted By INPUT:

Signature

Name

Title

Date

MEAOE 6/90

INPUT®

Competitive Environment

INPUT's report also provides you with valuable competitive information about vendors' views towards the Single European Market.

Vendor Issues

There are many issues facing applications vendors in the next decade. Vendors need to have a clear strategy towards standards, for example. Users are tending to move away from dependence on equipment vendors' operating systems, preferring an independent solution which allows greater portability across equipment platforms. There is also increasing acceptance of Systems Application Architecture (SAA). In some markets, adherence to SAA is vital. INPUT's report provides vital information in this area to help you plan your future strategy.

Users are now typically experienced buyers of packages, often in the second or third implementation of a system. This means that users are becoming more sophisticated in their demands, needing solutions that can integrate several of their business functions. Vendors must be able to offer products that can be integrated with existing systems. Products also need to be flexible to enable additional packages to interface with them in the future.

REPORT CONTENTS

Market Forces

- The applications solutions product market
- Vertical and cross-industry markets
- Application software products
- Turnkey

Competitive Environment

- Market structure
    - application software
    - turnkey vendors
- Market consolidation

Application Areas

- Banking and finance
- Insurance
- Manufacturing
- Accounting
- Human resources
- Planning and analysis

Vendor Challenges

- Quality
- Integration
- Industry standards
- The single European market

Recommendations

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT®

Independent Maintenance—Western Europe, 1990-1995

USE THIS REPORT TO FIND OUT:

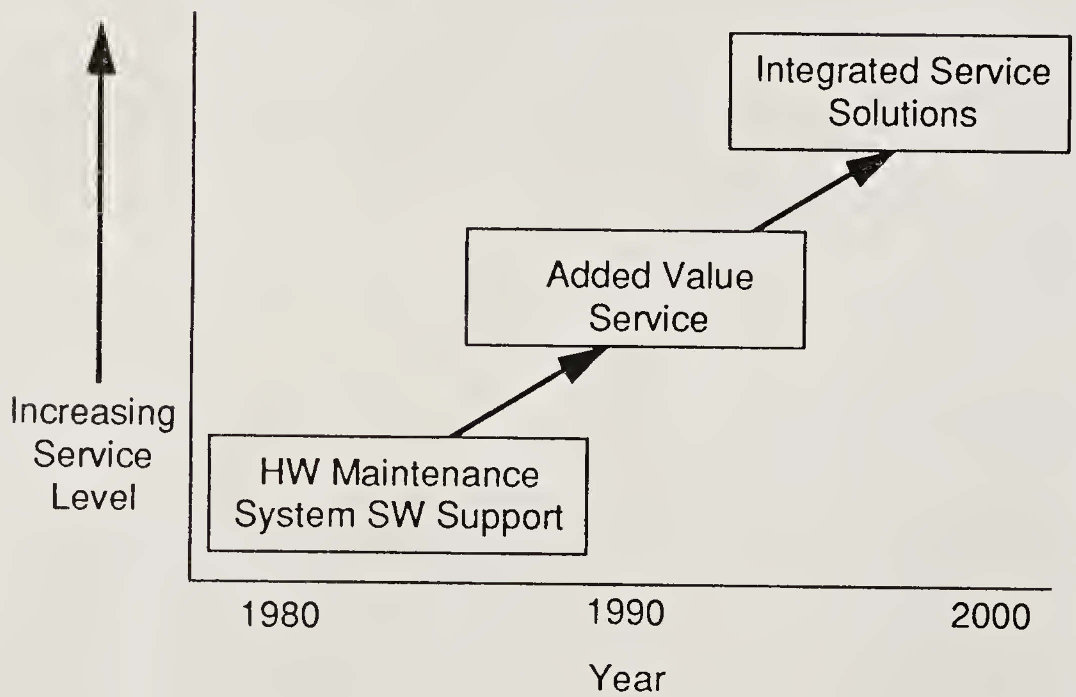
- What the next decade holds for independent maintenance vendors
- The extent to which independent maintenance companies have penetrated the market
- Which countries are growing the fastest
- Independent maintenance vendor rankings by 1989 revenues
- How equipment vendors are reacting to independent maintenance vendors' success

Independent maintenance companies set to grow despite slowing of customer services market.

What does the future hold for independent maintenance companies?

This report puts forward INPUT's viewpoint about the probable development of independent maintenance over the next decade. It gives some recommendations to independent maintenance vendors and assesses how far equipment vendors are catching up on the market shares they have lost. The report also assesses the current climate for maintenance and evaluates factors such as increasingly reliable equipment and cost reduction pressures from users. If your company's future depends on independent maintenance, this report is essential.

Long Term Service Trends



The Market

Independent maintenance of computer equipment in Western Europe is now a relatively well-developed market. There has been much merger and acquisition activity and aggressive marketing by independent maintenance vendors, resulting in the existence of many large pan-European independent maintenance companies. These have the financial stability and depth of expertise to offer a credible alternative to the maintenance services traditionally provided by equipment vendors. Independent maintenance vendors tend to have lower overheads than equipment vendors and have positioned themselves to compete on price.

The independent maintenance market will undergo some changes over the next decade. INPUT's report discusses the implications of these changes:

- Co-operative partnerships
- Diversification plans
- Software support

Find out why users choose independent maintenance

There are other reasons besides price for choosing independent vendors, which could indicate that equipment vendors have limited opportunities to regain lost business. It is vital to understand why users choose independent maintenance, in order to more effectively target your clients and prospects. INPUT's report helps you to do this.

Independent vendor sales profiles

Much of the success of independent maintenance in Western Europe has resulted from an aggressive sales and marketing approach. Companies dependent on maintenance for their revenues dedicate their activities towards this. Equipment vendors, however, tend to view equipment sales as their primary task.

INPUT's report draws some interesting comparisons and gives sales profiles for independent vendors, listing the percentage of employees in sales, revenue per sales head and revenue per employee.

The Market Forecasts

The forecasts cover the following countries:

- Belgium
- France
- Italy
- The Netherlands
- Sweden
- Spain
- United Kingdom
- West Germany

REPORT CONTENTS

Market Opportunities

- Market forecasts 1990-1995
- Country markets
- Market hierarchy
- Independent maintenance vendor market penetration
- Competitive profiles
- Equipment vendor reaction
- Acquisition and change
- Revenue streams

The Future Development of Independent Maintenance

- Vendor strategies
- Vendor growth prediction
- Co-operative partnerships
- Diversification plans
- Future directions
- Independent software support status
- Adaptation is the key

The Success of Independent Maintenance

- Attraction of reduced costs
- Equipment vendor recovery opportunities
- Independent vendor recipe for success
- Marketing successes
- Independent vendor weaknesses
- Key issues facing independent vendors

- Country Market Forecasts
- 66 independent maintenance vendor profiles

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

INPUT

Applications Solutions Opportunities Western Europe, 1990-1995

A NEW REPORT FROM INPUT

This report will help you assess the opportunities available for software application solutions in Europe. INPUT's report:

- Provides five-year market forecasts
- Identifies the fastest growing markets
- Describes market developments
- Discusses key opportunities for:
  - vertical market products
  - cross-industry market products
  - application software products
  - turnkey systems
- Discusses market issues
  - industry standards
  - quality
  - integration

Key Vendor Challenges

To provide:

➤ Integrated products

➤ Pan-European support

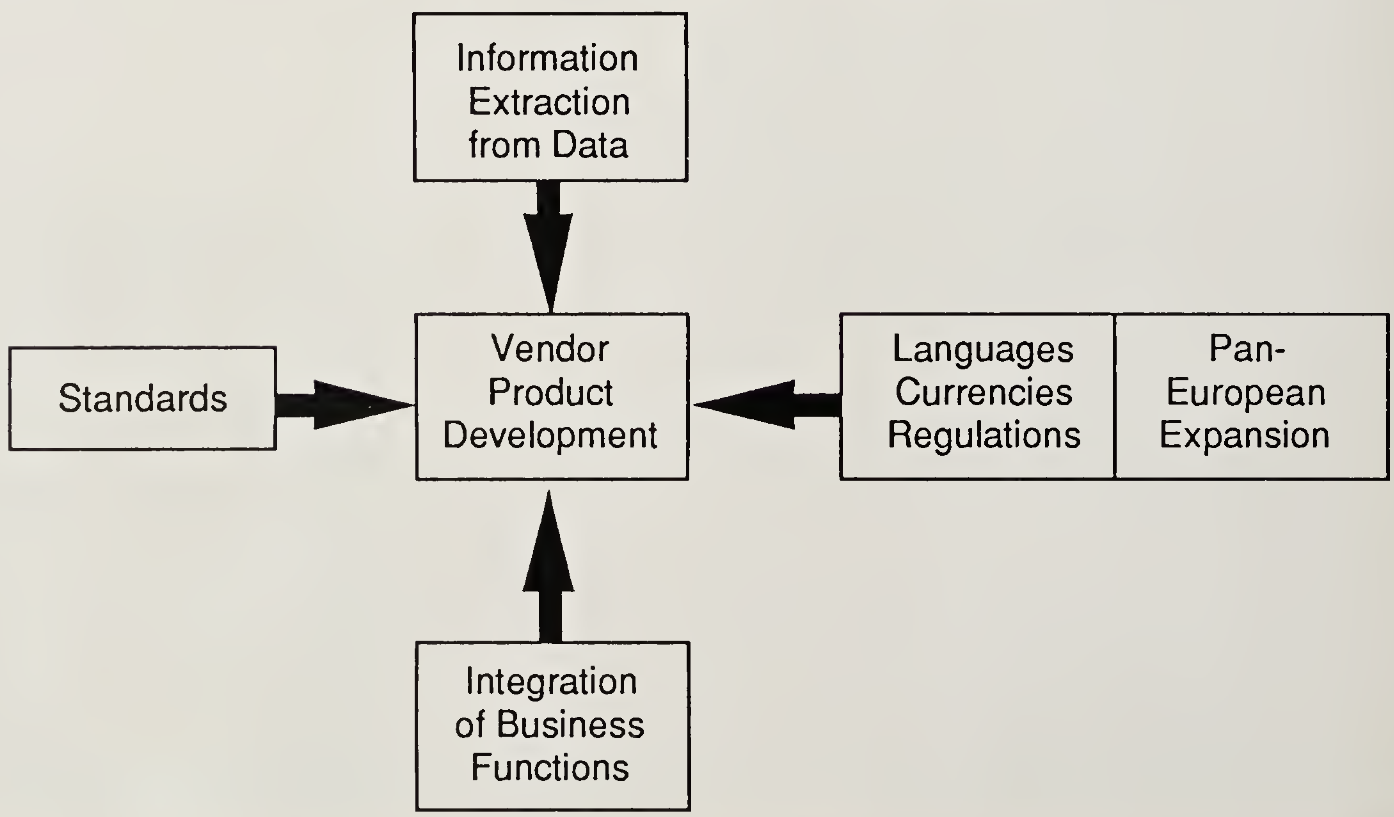
Applications Solutions Opportunities Western Europe, 1990-1995

Vendors of software applications solutions need to be aware of their buyers' selection criteria and need to know the commonest causes for complaint. This information can give your company a competitive edge, because you will know where to concentrate your efforts. INPUT's report, *Applications Solutions Opportunities—Western Europe, 1990-1995*, will provide this information. It discusses a number of user issues:

- Criteria in the purchase decision
- Support
- Documentation
- Functionality
- Errors
- Integration

The more that supplier companies understand users' issues, the more likely they will be able to satisfy users' requirements.

INTEGRATION: The Key to the 1990s



Order Form

INPUT's Research Studies

Yes!
Please enter my order as described:

Application Solutions Opportunities—Western Europe, 1990-1995 report at the fee of $2,250.

TERMS OF PAYMENT
Payment in full is due within 30 days of invoice date.

- ❑ Enclosed is my check in the amount of $________________.
- ❑ Bill my company on purchase order number ______________ in the amount of $________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax to the total amount.

CONDITIONS AGREEMENT
The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense which may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

INPUT
1280 Villa Street
Mountain View
CA 94041
(415) 961-3300
Telex 171407
Fax (415) 961-3966

Authorized By:

Organization

Name

Title

Address

Telephone

Signature Date

Accepted By INPUT:

Signature

Name

Title

Date

MEAOE 6/90

Competitive Environment

INPUT's report also provides you with valuable competitive information about vendors' views towards the Single European Market.

Vendor Issues

There are many issues facing applications vendors in the next decade. Vendors need to have a clear strategy towards standards, for example. Users are tending to move away from dependence on equipment vendors' operating systems, preferring an independent solution which allows greater portability across equipment platforms. There is also increasing acceptance of Systems Application Architecture (SAA). In some markets, adherence to SAA is vital. INPUT's report provides vital information in this area to help you plan your future strategy.

Users are now typically experienced buyers of packages, often in the second or third implementation of a system. This means that users are becoming more sophisticated in their demands, needing solutions that can integrate several of their business functions. Vendors must be able to offer products that can be integrated with existing systems. Products also need to be flexible to enable additional packages to interface with them in the future.

REPORT CONTENTS

Market Forces

- The applications solutions product market
- Vertical and cross-industry markets
- Application software products
- Turnkey

Competitive Environment

- Market structure
  - application software
  - turnkey vendors
- Market consolidation

Application Areas

- Banking and finance
- Insurance
- Manufacturing
- Accounting
- Human resources
- Planning and analysis

Vendor Challenges

- Quality
- Integration
- Industry standards
- The single European market

Recommendations

Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

MEAOE 6/90

INPUT®

Trends in Processing Services—Western Europe, 1990-1995

THE 1990s WILL BRING A MAJOR RESTRUCTURING OF THE TRANSACTION PROCESSING MARKET.

Use INPUT's report to

- Evaluate the effect of restructuring in the market.
- Learn important country differences—essential if you are intending to set up a pan-European infrastructure.
- Discover the technological issues driving and inhibiting the market.
- Discover how end-user pressures are changing the market—essential for meeting clients' requirements.
- Find out how to adapt your service to remain competitive in the 1990s .

Despite a decline in growth rate in the processing services sector over recent years, there are still opportunities worth over $7.8 billion.

Processing Services—A Sector Facing Change

The processing services market will undergo a major restructuring in the 1990s, and it is vital for European vendors to know what effect this will have on them, so that they can plan ahead.

INPUT's report *Trends in Processing Services—Western Europe,1990-1995* describes the current market climate and highlights market differences in 13 European countries. These changes will affect all country markets, but will be particularly significant in Scandinavian countries where processing accounts for a relatively large market share. The market will also be affected by the impact of these changes on the captive revenues of the closed user-group processing centres in Germany and Scandinavia.

The availability of more software on faster and cheaper hardware platforms has led to a decline in the growth rate in the processing services sector of the European software and service market. However, INPUT believes that there are still significant opportunities available for vendors.

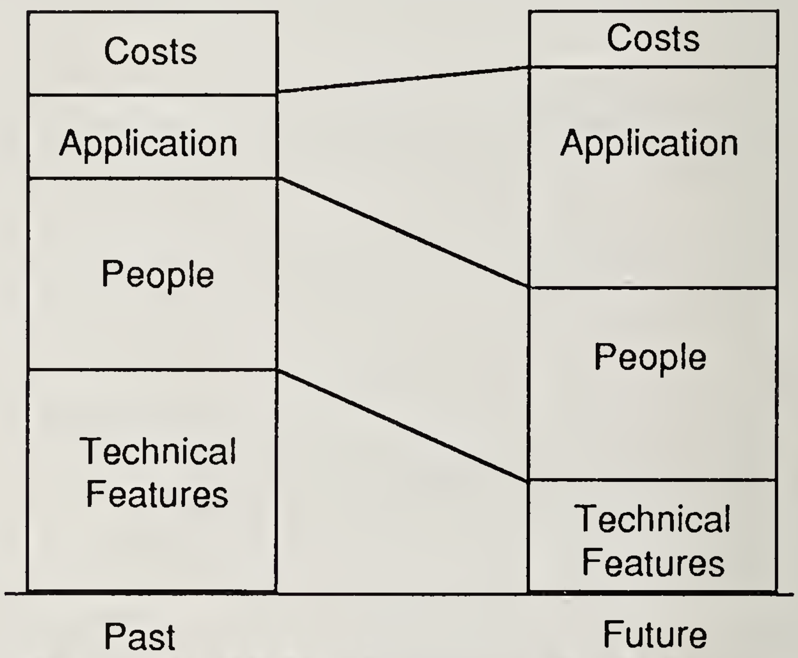
The report provides valuable guidance in a market—because of a marked decline in growth—where it is particularly important to be informed about opportunities.

INPUT's report provides the following:

- Vendor rankings according to 1989 revenues, by country
- Percentage of market share for each vendor
- Forecasts for growth—1990-1995—for Western Europe as a whole and by country

This data is invaluable for assessing the country markets that provide the best opportunities and for tracking competitors. The report also describes factors influencing each country market.

Evolution of Competitive Edge



Service Concept

The processing services market is becoming more competitive, as vendor companies are not only competing with each other, but also with IS departments of user organisations. There have been significant changes in the processing environment from the batch processing and timesharing services of ten years ago. It is now crucial for vendors to diversify into other areas. INPUT's report discusses some specific applications and recommends strategies for extending capability into new applications—for example, how payroll processing can be developed into a human resources system.

Trends

INPUT's report discusses the technological issues affecting the market, such as:

- Cost/performance ratio of equipment
- The effect of workstations and UNIX
- The effect of higher-level languages and their potential to enable users to solve systems problems in-house.

The above issues could be viewed as threats to the processing services market. INPUT's report describes how to turn these potential threats into opportunities.

User Base

The user base for processing services is changing as a result of European deregulation—merger and acquisition activity is creating larger companies seeking larger markets and greater efficiency. Vendors are having to adapt in the same way as the client base.

Find out:

- How deregulation in Europe is affecting the user base and forcing vendors to adapt accordingly
- Whether outsourcing is a reality, or whether the reverse is true—a return to in-house processing
- Which issues vendors view as particular challenges
- The essential elements of successful transaction processing

REPORT CONTENTS

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT OFFICES

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
Tel. (201) 299-6999
Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870
Fax (703) 847-6872

International

London
Piccadilly House, 33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, West Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

European Software and Services Markets

Industry Sector Studies

Identify Specific Opportunities In Your Target Markets

INPUT's reports on the five key industry sectors of the European software and services markets can help you identify specific opportunities in your target markets, keep ahead of trends and prepare for growth. You can use these reports to help plan your future strategy in each industry sector. You can find out which markets are growing fastest, which companies are active in each major country market and what is driving and inhibiting market growth.

INPUT has researched the following sectors in the major European markets of France, U.K., Germany and Italy:

- Banking and Finance
- Insurance
- Retail and Wholesale Distribution
- Discrete Manufacturing
- Process Manufacturing

Each report contains discussions of important issues and developments in each industry sector and the implications of these for software and services vendors.

The research reveals how each industry sector will be changing over the next five years—essential information to help vendors improve their performance in these markets.

INPUT's reports provide you with forecasts for expenditures in each industry sector for the following delivery modes:

- Processing Services
- Professional Services
- Systems Integration
- Software Products
- Turnkey Systems
- Network Services

Each industry sector report provides:

- market size and growth rate by:
  - country market
  - delivery mode
- leading vendors
- opportunities
- country market differences
- discussion of user issues
- future market outlook
- conclusions and recommendations

You can use these reports to gain valuable data on market size and to gain information on other companies active in the market, including market share information.

Banking and Finance Sector

INPUT's report describes the new opportunities arising in this exciting, fast-changing sector of the European software and services market.

The plan by the European Commission to deregulate financial markets by 1 January 1993 is forcing banking and finance organisations to restructure and at the same time, develop new products and services. The market is also becoming more and more competitive as banks and other financial institutions expand beyond their traditional market niches. The banking and finance sector comprises about 20% of the total software and services market, which represents a significant opportunity for vendors.

Merger and acquisition activity is also driving the market for software and services as new organisations seek to integrate their information systems and develop new ones.

You will learn about:

- the effect of the Single European Act
- opportunities in the banking sector
- opportunities in the securities sector
- the impact of UNIX
- the competitive environment

Insurance Sector

Deregulation, competition from banks and rapid technological development are some of the factors driving the insurance sector of the software and services market. INPUT's report can help you make the most of these opportunities by providing market size information, and discussions of user issues and developments in the industry that are affecting demand for software and services.

You can use INPUT's report to find out software and services expenditures in three sectors of the insurance market:

- life
- non-life
- re-insurance

Demand for software and services is also divided by platform:

- mainframes
- minis
- PCs and workstations

The insurance market is very fragmented, and to survive in a single competitive market, many insurance companies have been forming alliances. This has resulted in a market with distinct national characteristics, which INPUT's report helps you identify.

INPUT's Research Studies

SECTION ONE: MY ORDER

I would like to order INPUT's industry sector reports on European Software and Services Markets, 1990-1995:

- ☐ Banking and Finance Sector
- ☐ Insurance Sector
- ☐ Discrete Manufacturing Sector
- ☐ Process Manufacturing Sector
- ☐ Retail and Wholesale Distribution Sector

I am ordering:

- ☐ 1 study at the fee of ....$3,000.
- ☐ 2 studies at the fee of ....$5,000.
- ☐ 3 studies at the fee of ....$7,500.
- ☐ 4 studies at the fee of ....$10,000.
- ☐ 5 studies at the fee of ....$12,000.

☐ I would like further information on the following:

____

____

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

Payment in full is due within 30 days of invoice date.

☐ Enclosed is my check for $ ______________ to cover the cost of my order.

☐ Please invoice my company for $ _______________ on purchase order number ____________________.

California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.

SECTION THREE: AUTHORIZATION

Authorized By:

Organisation

Name

Title

Address

Telephone

Signature Date

SEE TERMS OTHER SIDE

Accepted By INPUT:

Signature

Name

Title

Date

MEIXO 11/90 us

INPUT
1280 Villa Street
Mountain View
CA 94041
Tel. (415) 961-3300
Fax (415) 961-3966

CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person—including parent, subsidiary, or affiliated organizations—without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided.

INPUT

Process Manufacturing Sector

INPUT's research shows that considerable opportunities are opening up for software and service vendors in the process manufacturing sector in Western Europe. While the process manufacturing sector has traditionally led the way in process automation at the shop floor level, companies have only recently discovered the benefits of production administration systems.

The result is a rapidly growing market in which there are few established vendors. However, many vendors are now entering the market and are faced with the challenges of both developing and marketing new products and services. The battle for market share in this sector will be intense over the next few years. To be successful in this market, vendors need accurate information on market size and competitive market shares. INPUT's report can provide you with the information you need to improve your performance in this specialised market sector.

Another complex aspect of this sector is the pronounced trend towards open systems and UNIX-based packages. INPUT's report describes the opportunities available for vendors in this area.

Discrete Manufacturing Sector

INPUT's research in the discrete manufacturing sector shows that partnerships between software and service vendors are becoming increasingly important in order for vendors to succeed in serving the European discrete manufacturing sector. Users are starting to move towards computer-integrated manufacturing environments, and vendors are unable to supply the full range of applications and services required. Accordingly, strategic partnerships are developing between vendors with complementary products and services.

This situation presents opportunities for many vendors, as these partnerships are no longer restricted to those between equipment vendors and application software product vendors. In particular, it provides the smaller players with a specialised product or skill the opportunity to take advantage of the marketing strengths of the major vendors.

INPUT's report can assist you in assessing the competitive scenario in the discrete manufacturing sector and can help you to plan your future strategies in this market.

Retail and Wholesale Distribution Sector

Achieving savings through faster product movement is the top priority driving investments in software and services for European distribution businesses. Changing business practices and the use of scanning EPOS (Electronic Point of Sale) terminals are also creating demand for new applications.

INPUT's report helps you identify these opportunities and provides a clear picture of the market developments and their effect on the software and services market.

This report provides information about wholesalers' and retailers' needs and what sort of systems they are seeking to implement.

INPUT's research has shown that there are significant differences among European countries in the structure of their local distribution markets, which leads to very different demands for solutions. INPUT's report explains these differences and their implications for software and services vendors.

INPUT's report also identifies five stages of IS development, defining how far IT has extended its influence within a distribution company. Organisations are classified by which stages they have reached to improve targeting and development planning by vendors and users. While most vendors are promoting stages 2, 3, 4 and 5, most users are still struggling to implement stage 1.

INPUT's report helps you understand this development process.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

INPUT Offices

North America

San Francisco
1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300
Fax (415) 961-3966

New York
Atrium at Glenpointe
400 Frank W. Burr Blvd.
Teaneck, NJ 07666
Tel. (201) 801-0050
Fax (201) 801-0441

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

International

London
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
Tel. (071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
Tel. (33-1) 42 77 42 77 Fax (33-1) 42 77 85 82

Frankfurt
Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
Tel. (0) 6447-7229 Fax (0) 6447-7327

Tokyo
Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 864-0531 Fax (03) 864-4114

INPUT®

Research and Consultancy Services

for the
Computer
Software
and Services
Industry

The Marketing Challenges of the 1990s

In today's fast moving and competitive software and services industry, it is becoming increasingly difficult to keep up-to-date with the latest issues and trends in the marketplace and to keep abreast of developments from the competition. Executives and managers are under increasing pressure to gain insight into the markets, track user trends, collect market size data and position their company against the competition.

INPUT can help meet these challenges with its planning and advisory services.

Clients

INPUT's clients are executives and managers with responsibility for marketing, strategic planning and business development within the computer software and services industry.

They include more than 100 of the world's largest and most technically advanced companies including Digital, IBM, Unisys, ICL, BULL, Olivetti, SD-Scicon, Cap Gemini Sogeti, the Sema Group, Sligos and Finsiel.

Many clients have taken advantage of INPUT's services on a continuous basis for many years, some since 1974 when INPUT was founded. Clients include vendors of professional services, systems integration, software products, processing services, turnkey systems, communications systems and equipment and software maintenance and support.

INPUT

INPUT is an international market research consultancy specialising in tracking developments in the computer software and services industry. INPUT's continuous research and consultancy services enable managers to make informed business and marketing decisions.

On a regular basis throughout the subscription period, clients are provided with the information that they need about their markets:

- market size data and forecasts
- user trends
- analysis of market issues
- strategic assessment of market potential
- competitive tracking and analysis
- recommendations

An annual subscription to INPUT's services means that regular advice and reliable information can help you plan for a more profitable business.

Expertise

INPUT's clients benefit from the expertise of its professional staff, many of whom have over twenty years of computer industry experience and are specialists in their fields. These include telecommunications, software products, customer service, information systems, marketing and planning. INPUT specialises in market and competitive analysis, research into user needs and satisfaction levels and market issues and trends.

INPUT's Services

INPUT's continuous advisory services comprise a number of elements to provide clients with up-to-date strategic information.

A series of reports examine issues and trends and present forecast data. To alert clients to key research findings and trends, research bulletins are released before the report is published.

Consultants are available for informal discussions or special presentations to enable clients to obtain an independent view on a particular issue. A hotline enquiry service and a library of up-to-date vendor files add an extra dimension to a client's own marketing department.

Some of INPUT's research programmes include a regular newsletter to bring clients topical news on various aspects of the industry.

INPUT holds regular client meetings to enable exchange of ideas. The meetings provide an ideal forum to meet other managers in the industry as well as INPUT consultants.

INPUT also conducts multiclient studies, carries out confidential studies to meet special research needs and can advise on merger and acquisition strategy and assist in its implementation.

INPUT's Programmes

- Customer Services
- Market and Vendor Analysis (Software and Services)
- Systems Integration
- Network Services

Offices

INPUT has offices in London, New York, Washington, Tokyo and Paris, with its world HQ based in Mountain View, California.

INPUT LTD
Piccadilly House
33/37 Regent Street
London SW1Y 4NF
Tel: 071 493 9335
Fax: 071 629 0179

INPUT®

Offices

NORTH AMERICA

Headquarters
1280 Villa Street
Mountain View, CA 94041-1194
(415) 961-3300
Telex 171407   Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630   Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870   Fax (703) 847-6872

INTERNATIONAL

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77   Fax (33-1) 42 77 85 82

Tokyo
Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japan
(03) 864-0531   Fax (03) 864-4114

OUTSOURCING OF INFORMATION SYSTEMS
June 7 & 8, 1990, Omni Shoreham Hotel, Washington, D.C.

CONFERENCE REGISTRATION

Conference fees:
- First attendee from a company $1395
- All additional attendees $995

Subscribers to INPUT's Market Analysis Program may attend at the fee of $495 per person.

PAYMENT AND CANCELLATION POLICY
You may cancel your reservation without a 25% cancellation fee until May 9. Cancellations must be in writing. INPUT will consider purchase order numbers or company checks as proper reservations. We also accept American Express. INPUT reserves the right to make changes to this conference without notice.

ACCOMMODATIONS

Washington's famous Landmark Hotel, the Omni Shoreham, beautifully restored to the grand style of days gone by and uniquely located on 11 tranquil acres in Rock Creek Park in the heart of Washington, D.C., just one block from Woodley Park Metro Station, minutes from the Smithsonian Institute, museums, the Capitol, and walking distance from the National Zoo.

Hotel reservations may be made by calling the Omni Shoreham at (202) 234-0700. Be sure to ask for the INPUT Conference special rate. Available rooms may be taken quickly, so please contact the hotel promptly.

REGISTER TODAY!
CALL, MAIL or FAX your registration to INPUT to any office listed below.

INPUT Offices

North America

Headquarters
1280 Villa Street, Mountain View, CA 94041 (415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054 (201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335 Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114

Yes! Please confirm my registration for the
INPUT Conference, June 7 & 8, 1990, Washington, D.C.

Company

Name

Title

Address

City State Zip

Phone

Signature

- ❑ YES! I am registering for this conference. Bill my company $1,395.
- ❑ I am registering as an additional attendee. Bill my company $995.
- ❑ I am registering as an INPUT subscriber. Bill my company $495.

Name

- ❑ Have a representative call me.

INPUT • 1280 Villa Street • Mountain View, CA 94041
415-961-3300 • Fax 415-961-3966

JJJJ 4/90

OUTSOURCING OF INFORMATION SYSTEMS

Jun[illegible] & 8, 1990, Omni Shoreham Hotel, Washington, D.C

CONFERENCE REG[illegible]TRATION

Conference fees:

Subscribers to INPUT's Market Analysis [illegible]rogram may attend at the fee of $495 per person

- First attendee from a non-subscribing company ... $5[illegible]
- All additional attendees ... $495

PAYMENT AND CANCELLATION POLICY

Cancellations must be in writing and are subject to a 25% cancellation fee if received after May [illegible]. INPUT will consider purchase orders [illegible] or company checks as proper [illegible]. We also accept American Express [illegible] INPUT reserves the right to make changes in [illegible] conference without notice.

FLIGHT ARRANGEMENTS

In making flight arrangements, please be aware that we [illegible] a program with American Airlines allowing you the following discounts:

- [illegible]0% off of full coach fare
- [illegible]% off any other discounted fare

[illegible] please place your reservation under [illegible] and specify dates of travel. These are available through Dulles National and [illegible]/Washington airports.

ACCOMMODATIONS

Washington's famous landmark hotel, the Omni Shoreham, beautifully restored to the [illegible] of days gone by and uniquely located on [illegible] tranquil acres in Rock Creek [illegible] in the heart of Washington, D.C., just [illegible] from Woodley Park Metro Station, [illegible] from the Smithsonian Institute, museums, [illegible], and walking distance from the National Zoo.

Hotel reservations may be made by [illegible] Omni Shoreham at (202) 234-0700. Be sure to ask for the INPUT Conference special rate. Available rooms [illegible] please contact the hotel [illegible].

Yes! Please confirm my registration for the INPUT Conference, June 7 & 8, 1990

I am registering [illegible] my company [illegible]

Company

Name

Title

Address

City | State | Zip

Phone

Signature

[illegible]

[illegible]

Charge [illegible] to my American Express card

[illegible]

Expiration date

Signature

Please make checks payable to INPUT

INPUT 1280 Villa Street • Mountain View, CA 940[illegible] • 415-961-3[illegible] • Fax 41[illegible]

INPUT®

Information Services Industry

Professional Services Program

Professional Services Program

PROFESSIONAL SERVICES OPPORTUNITY

The professional services market is one of the fastest-growing markets in the information services industry. The Professional Services Program is being offered to companies with a need to forecast the market, analyze competition, and address user requirements. It provides the research-based information required for effective decision making.

MARKET ANALYSIS REPORTS

Each report contains five-year market forecasts, overall and by market component. Where appropriate, industry sector and cross-industry market forecasts are included with corresponding trend analyes. Market forces, trends, and issues are analyzed.

U.S. Professional Services Market Analysis and Forecast
Includes forecasts, analyses and trends for this market including consulting services, education and training, software development, and systems operations.

U.S. Systems Integration Market Analysis and Forecast
Analyzes the U.S. systems integration market by component and by type (application, network, and data). Focus is on commercial markets, which are analyzed by industry sector.

Federal Professional Services Market Analysis and Forecast
Forecasts the professional services market including consulting, education, training, programming and analyses, facilities management, systems integration, and additional specific opportunities. Contains discussion of agencies' and vendors' perspectives of the market and factors influencing the marketplace.

RESEARCH BULLETINS

Frequent analysis of market events, trends, and forecasts. These contain not just news but useful information particularly relating to research findings.

VENDOR PROFILES

Profiles of key public and private professional services vendors include:

- General information (company name, address, telephone, chief executive's name, public/private, employees, revenues)
- Summary of company origin, merger/acquisition history, events impacting company growth
- Financial data, when available
- Revenue distribution by delivery mode
- Employee and organization data
- Key products and services
- Industry markets serviced

Examples of companies profiled:

- Andersen Consulting
- Computer Sciences Corp.
- Computer Task Group
- Electronic Data Systems
- Planning Research Corporation

INPUT®

CLIENT SUPPORT

Access to INPUT Consultants
Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.

"Hotline" Inquiry Service
The "hotline"inquiry service fulfills 'short-term' research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.

Client Conference
This annual conference enables you to be updated on key strategic industry trends and developments, as well as to meet senior staff from other INPUT clients. Attendance at this conference is available at a reduced fee for full subscribers.

OPTIONAL RELATED SERVICES

Custom Research and Consulting
Projects analyze information systems opportunities, user needs, user satisfaction, competitive environment, acquisition targets, etc.

On-Site Visit
An INPUT consultant presents research results and industry analyses at your site. Your issues and interests are discussed together with industry trends.

Consultant Presentations
INPUT's consultants are available to provide presentations for planning meetings, user groups, or other functions.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS

- U.S. Professional Services Market Analysis and Forecast
- Systems Integration Market Analysis and Forecast
- Federal Professional Services Market Analysis and Forecast

RESEARCH BULLETINS

VENDOR PROFILES

- Professional Services Companies
  - Public
  - Private
  - Units of Other Companies

CLIENT SUPPORT

- Access to INPUT Consultants
- "Hotline" Inquiry Service
- On-Site Visit
- Client Conference

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

Offices

North America

Headquarters
1280 Villa Street
Mountain View, CA 94041
(415) 961-3300
Telex 171407 Fax (415) 961-3966

New York
959 Route 46 East, Suite 201
Parsippany, NJ 07054
(201) 299-6999
Telex 134630 Fax (201) 263-8341

Washington, D.C.
1953 Gallows Road, Suite 560
Vienna, VA 22182
(703) 847-6870 Fax (703) 847-6872

International

Europe
Piccadilly House
33/37 Regent Street
London SW1Y 4NF, England
(071) 493-9335
Fax (071) 629-0179

Paris
52, boulevard de Sébastopol
75003 Paris, France
(33-1) 42 77 42 77
Fax (33-1) 42 77 85 82

Tokyo
Saida Building,
4-6, Kanda Sakuma-cho
Chiyoda-ku,
Tokyo 101, Japan
(03) 864-0531 Fax (03) 864-4114